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WATERTON TOURISM STUDY

MARKETING STRATEGY

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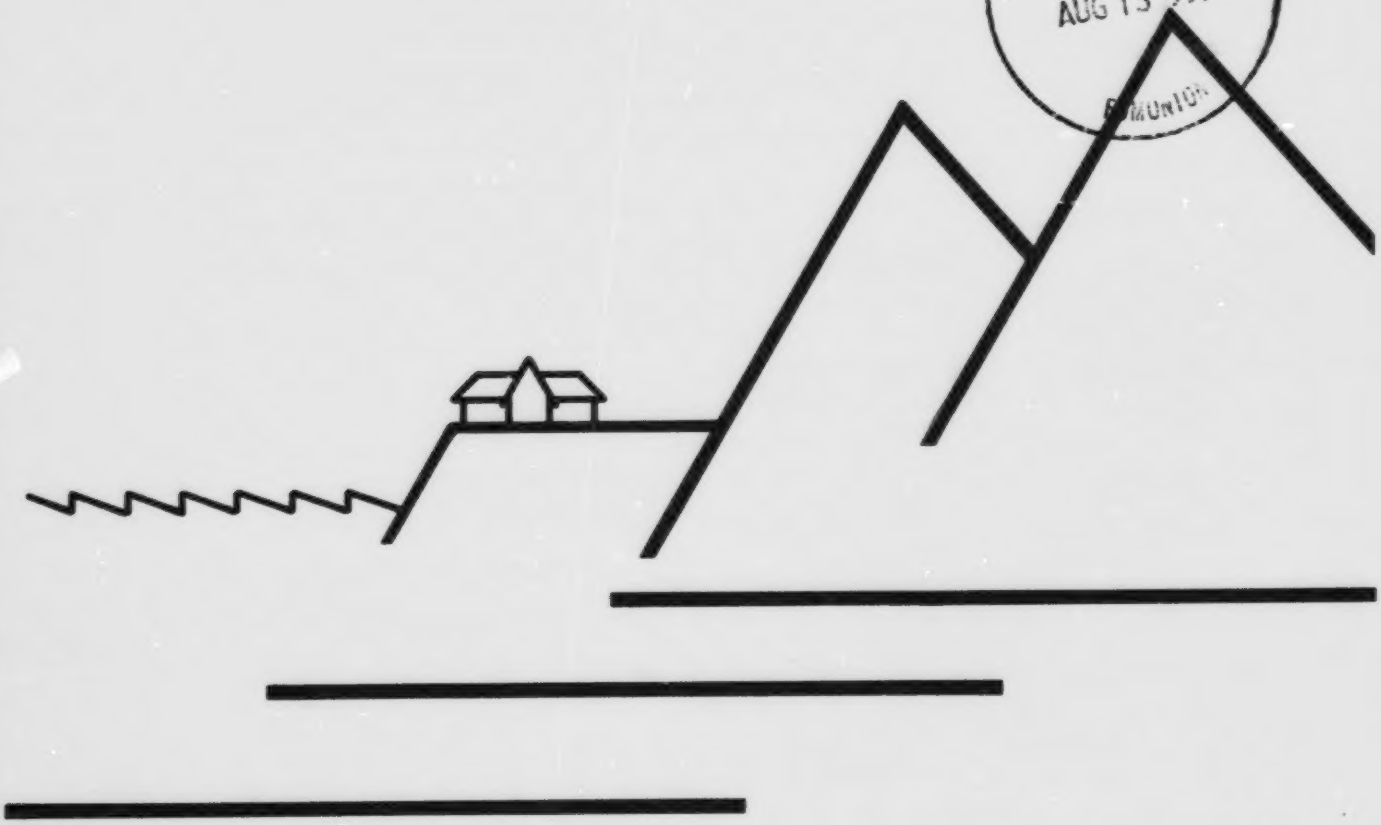

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February, 1991

TO WHOM IT MAY CONCERN

The following consultant's study was undertaken to provide tourism information on Waterton Lakes National Park. The study involved two major components: collection of primary data on existing visitor use of the Park; and preparation of a marketing strategy. Much of the work for the study was completed in 1988. However, verification of some of the data from the surveys was required. Due to unforeseen delays, the study is only now being released. It is felt that the information obtained from the study is still relevant.

This report contains the proposed marketing strategy, plus information on tourism resources and opportunities, and a summary profile of current visitors to, and potential target markets for, the Park. The Exit Survey report is available under separate cover.

It should be noted that this study was conducted by an independent consultant commissioned by Alberta Tourism. As such, this study does not represent government policy, nor does it imply any commitment to implementation. It is recognized that implementation of the marketing strategy will be addressed in a manner that is consistent with Canadian Parks Service policies, and the park management planning process.

If you have any comments regarding the report, please contact:

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Yours sincerely,

Bernard F. Campbell
Deputy Minister

WATERTON TOURISM STUDY

MARKETING STRATEGY

Prepared for:

Alberta Tourism

Prepared by:

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In Association with
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August, 1988

Printed on Recycled Paper

"WHERE THE MOUNTAINS MEET THE PRAIRIE"

WATERTON TOURISM STUDY
MARKETING STRATEGY

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WATERTON TOURISM STUDY
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ACKNOWLEDGEMENTS

The Waterton Tourism Study was conducted under the direction of a Steering Committee comprised of the following members and advisors.

Brian Baker	Waterton Chamber of Commerce and Visitors Association
Brenda Bush-LaFrance	Alberta Tourism
Jim Hartley	Canadian Parks Service
Tom Hill	Department of Regional Industrial Expansion
Alan Koehler	Alberta Tourism
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Enid Markus	Alberta Tourism
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Randy Smith	Chinook Country Tourist Association
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Special thanks to the summer and part time employees in Waterton that were responsible for the administration of the surveys. They included:

L. Baker, Local Supervisor
M. Brady
L. Montgomery
B. Russell
B. Tilson
J. Van Lent
D. Westwood
M. Gamble
N. Nester
E. Sonnenberg
E. Thrall
K. Wells

This study was made possible through funding under the Canada/Alberta Tourism Agreement.

1.0 INTRODUCTION

The purpose of this document is to outline a marketing strategy for improving tourism in Waterton Lakes National Park.

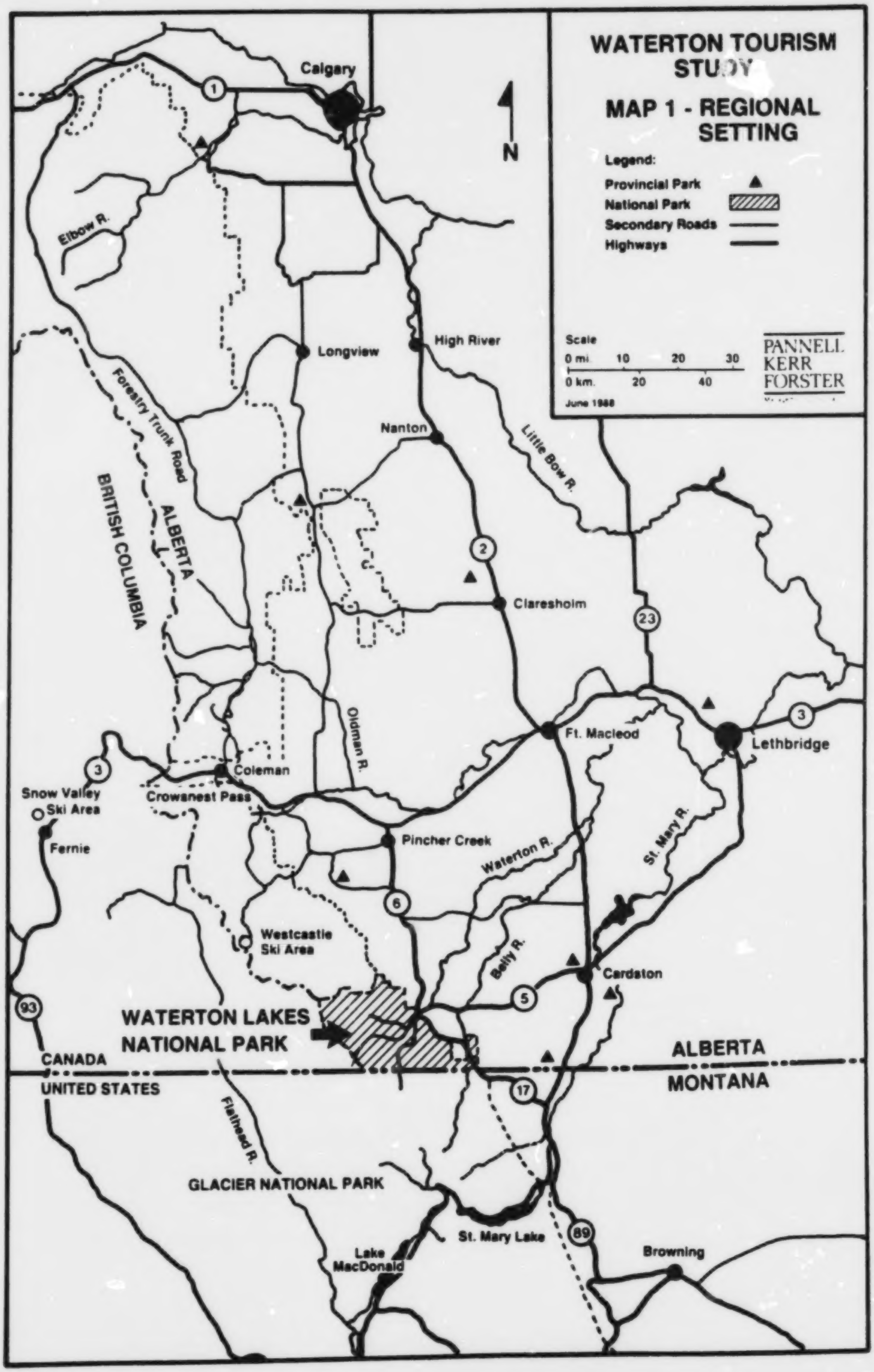
1.1 Waterton Lakes National Park: "Where the Mountains Meet the Prairie"

Waterton Lakes National Park, one of five National Parks in Alberta, is located in the extreme southwest corner of Alberta, 266 km (165 miles) southwest of Calgary. The Park occupies 526 square kilometers (203 square miles) and is bounded on the west side by the Continental Divide which is the border between Alberta and British Columbia. On the southside, it is bounded by the fourty-nineth parallel, the border between Canada and the United States. On the north and east sides, the Park is bordered by forested areas and ranch lands. The Park became Canada's fourth National Park in 1895. Map 1 shows the Park in a regional context. Map 2 illustrates the Park's main features, road network, lakes, mountains and trails.

To the south of Waterton Lakes National Park across the Canada-United States border is the larger Glacier National Park with it's famous landscape and the Going-to-the-Sun Road. In 1932, the Waterton-Glacier International Peace Park was created in recognition of its shared natural features and in honour of the mutual aspirations of people from both countries who supported the Parks.

1.2 The Waterton Tourism Study

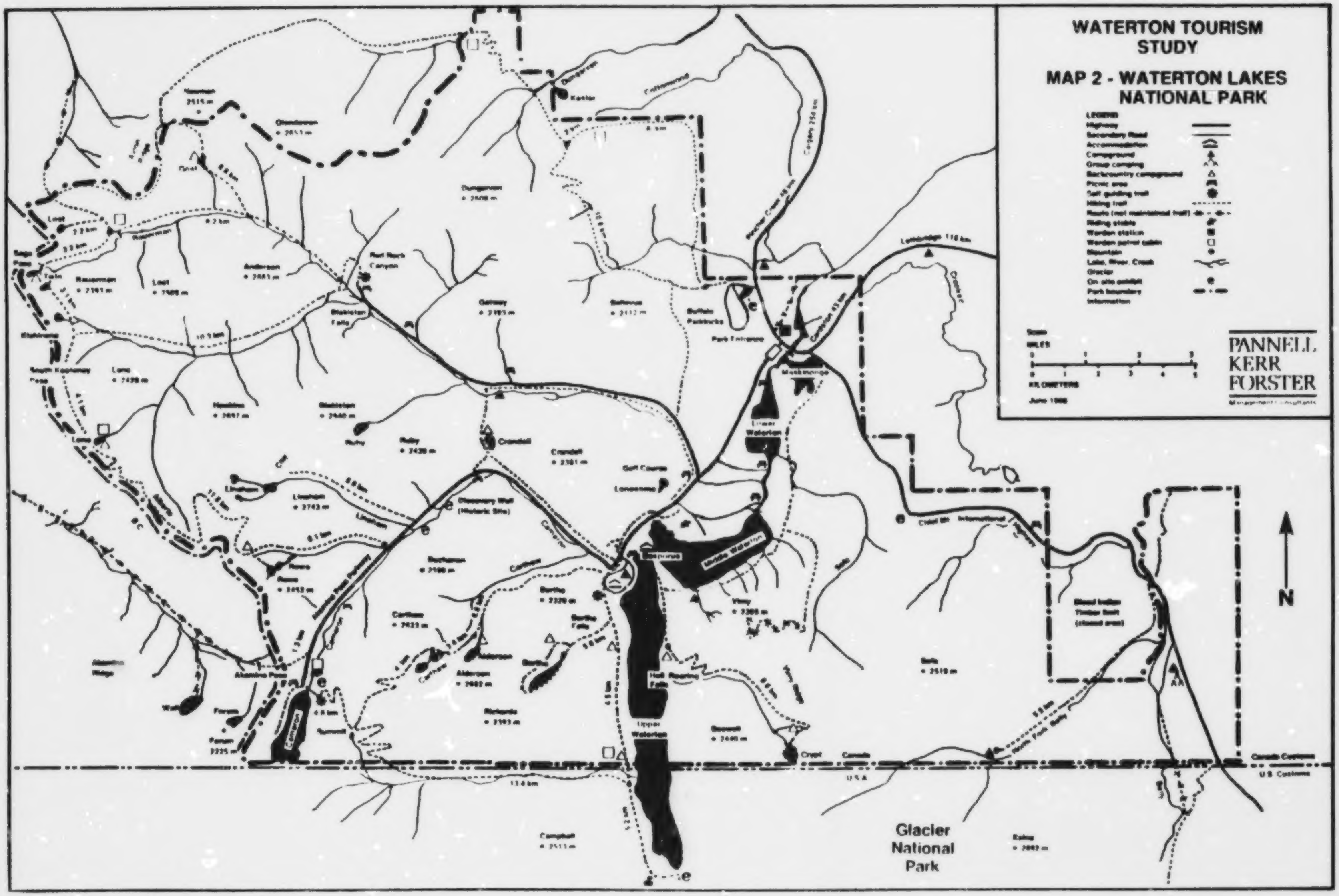
The Waterton Tourism Study was commissioned in the fall of 1986 after a group of businesses and other interested residents in and around the Park identified the need to develop a tourism marketing strategy. As a basis for this strategy, it was decided to develop a profile of users and identify and assess opportunities for improving tourism within the Park. A Steering Committee comprised of representatives from the Canadian Parks Service, Canada Department of Regional Industrial Expansion, Alberta Tourism, Chinook Country Tourist Association and the Waterton Chamber of Commerce and Visitors Association was established to guide the consulting consortium lead by Pannell Kerr Forster, Management Consultants.



WATERTON TOURISM STUDY

MAP 1 - REGIONAL SETTING

Legend:
Provincial Park ▲
National Park ▨
Secondary Roads
Highways
Scale
0 mi 10 20 30
0 km. 20 40
June 1988
PANNELL KERR FORSTER
N
Calgary
1
Elbow R.
Longview
High River
Forestry Trunk Road
Nanton
Little Bow R.
BRITISH COLUMBIA
ALBERTA
2
Claresholm
23
Oldman R.
Ft. Macleod
3
Lethbridge
Coleman
Crowsnest Pass
Snow Valley Ski Area
Fernie
Pincher Creek
Waterton R.
St. Mary R.
6
Westcastle Ski Area
Belly R.
Cardston
5
93
WATERTON LAKES NATIONAL PARK
CANADA
UNITED STATES
ALBERTA
MONTANA
17
Flathead R.
GLACIER NATIONAL PARK
St. Mary Lake
89
Lake MacDonald
Browning



WATERTON TOURISM STUDY

MAP 2 - WATERTON LAKES NATIONAL PARK

LEGEND
Highway
Secondary Road
Accommodation
Campground
Group camping
Backcountry campground
Picnic area
Self guiding trail
Hiking trail
Route (not maintained trail)
Riding stable
Warden station
Warden patrol cabin
Mountain
Lake, River, Creek
Glacier
On site exhibit
Park boundary
Information
Scale
MILES
0
1
2
3
0
1
2
3
4
5
KILOMETERS
June 1986
PANNELL KERR FORSTER
Management Consultants
N
Upper Waterton
Middle Waterton
Lower Waterton
Cameron
Glacier National Park
Canada
U.S.A.
Canada Customs
U.S. Customs
Lethbridge 118 km
Calgary 256 km
Cardston 43 km
Pincher Creek 48 km
Park Entrance
Buffalo Paddocks
Red Rock Canyon
Blakiston Falls
Crandell
Golf Course
Discovery Well (Historic Site)
Akamina Pass
South Kootenay Pass
Hell Roaring Falls
Crypt
Blood Indian Timber Limit (closed area)
B.C.

The study area includes all lands within Waterton Lakes National Park and key tourism/recreation opportunities within the immediate adjacent area to the north and east of the Park including communities and attractions such as Pincher Creek, Cardston, and the Head-Smashed-In Buffalo Jump Interpretive Centre. The three components to the study included visitor use and profile surveys, identification and assessment of tourism opportunities and preparation of a marketing strategy.

Visitor Use and Profile Surveys

This component involved a number of surveys including a Park exit survey conducted from November 1, 1986 through October 31, 1987. It also included surveys of motorcoach tour passengers, tour escorts and drivers, Waterton cottage and business leaseholders, motorists travelling into Alberta at the Chief Mountain and Carway ports of entry, and residents in major centres within the region including Medicine Hat, Lethbridge, Calgary and Great Falls, Montana. This was the most time consuming component of the study involving primary research to determine a visitor profile which would assist in developing the marketing strategy. The Exit Survey report is available upon request.

Identification and Assessment of Tourism Opportunities

This component involved the use of the survey data and other information from various sources to identify and assess existing and potential tourism opportunities in Waterton Lakes National Park and the immediate area.

Marketing Strategy

This component involved the preparation of a marketing strategy based on the information compiled from the previous two components that would address short, medium, and long term strategies for marketing tourism in the Park and at the same time ensuring compatibility with the present and future management objectives of the Canadian Parks Service in Waterton Lakes National Park.

Throughout the study process, there were several opportunities and efforts made to involve a broad cross-section of interested individuals, groups and visitors in determining the tourism future of Waterton Lakes National Park. Public Open Houses were held on three occasions to solicit input from people interested in the future of tourism in the Park. There were also stakeholder workshops in September of 1987 and in April of 1988 to bring about a common understanding and direction for implementation of an acceptable and responsible tourism marketing strategy for Waterton Lakes National Park.

Prior to and during the study, several initiatives were taken by community businesses and leaseholders in cooperation with the Canadian Parks Service, Alberta Tourism and Chinook Country Tourist Association to promote Waterton Lakes National Park. Indeed, there were several successful promotions implemented that attracted more visitors to the Park. Also, some of the business people in Waterton examined and undertook opportunities to change their operations to appeal to a broader cross-section of existing and potential markets. A few businesses have decided to open on a year-round basis when in the recent past, most businesses closed by mid September and did not open until mid May.

1.3 Marketing Framework

The Canadian Parks Service (formerly Parks Canada) mandate for Waterton Lakes National Park is clearly stated in the National Parks Act:

> **To protect for all time those places which are significant examples of Canada's natural and cultural heritage and also to encourage public understanding, appreciation and enjoyment of this heritage in ways which leave it unimpaired for future generations.**

It is important that the very resources attracting visitors are not mismanaged or abused as a result of marketing tourism. Therefore, there must be a balance between tourism marketing activities and overall sensitivity to the Canadian Parks Service mandate.

It also must be recognized that there are other interested individuals and groups in the region. Certainly, any increase in visitation or benefits accrued to Waterton Lakes National Park will also create increased visitation and benefits to communities within the region. It is therefore important to involve people from the surrounding region in marketing Waterton and for Waterton stakeholders to participate in marketing programs offered and implemented by those within the southwest region of the province.

1.4 Report Outline

The marketing strategy report is divided into four sections. The next section (Section 2.0) presents a synopsis of tourism resources and an opportunities assessment for Waterton Lakes National Park and the surrounding area. It also includes a summary of the implications of plans and policies applying to the Park and the surrounding area. The markets, both existing and potential, are profiled in Section 3.0. The marketing strategy is presented in Section 4.0 along the lines of the four p's of marketing: product, price, place, and promotion. Finally, Section 5.0 outlines the implementation program including mechanisms for monitoring and evaluating the success of the strategy. A selected bibliography of key reference materials for this study and further reading is included at the end of this report.

2.0 WATERTON AND AREA RESOURCES AND OPPORTUNITIES

A synopsis of the Park's tourism and natural resources and the current situation respecting the visitation to and use of the Park is presented in this section. In addition, the tourism implications of plans and policies applicable to Waterton Lakes National Park are presented. The section concludes with the identification and assessment of tourism opportunities in Waterton Lakes National Park and the immediate area.

Detailed descriptive inventories of the resources are contained in numerous documents and studies. For a basic listing and qualitative description of Park facilities and services, see the Waterton Park Chamber of Commerce and Visitors Association Visitors Guide. There are also a number of other excellent publications which inventory and describe the natural and man-made attributes of Waterton Lakes National Park. Recommended reference publications include:

- Waterton Lakes National Park by Heather Pringle, published in cooperation with Parks Canada and the Canadian Government Publishing Centre (1986);
- Waterton and Northern Glacier Trails for Hikers and Riders prepared by Russell, Russell, Russell and Haig-Brown published by the Waterton Natural History Association (1984); and
- Parks in Alberta: A Guide to Peaks, Ponds, Parklands, and Prairies by Joy and Cam Finlay, published by Hurtig Publishers (1987).

2.1 Natural and Human History Resources

Waterton Lakes National Park represents one of the most complex and interesting natural ecosystems and areas of Native history in North America. It has a number of unique and interesting geology, climate, ecology, vegetation, wildlife, native people and settlement characteristics which can be summarized as follows:

Geology

- Waterton Lakes National Park has some of the oldest exposed sedimentary rock in North America. At Cameron Falls, water cascades over 1.5 billion year old beds of dolomite and limestone.
- The mountains in Waterton were formed around 50 to 100 million years ago and are part of the Lewis Overthrust which stretches from the Marias Pass in the United States to an area south of the Bow River in Banff National Park.
- Much of Waterton's beautiful natural features were modelled by glaciers. These features include the Waterton Valley, Cameron Falls and Cameron Lake. Cirques, eskers, hanging valleys, and talus slides are some of the common features in the Park carved out by the glaciers.
- Some of the unique picturesque mountain and rock features in the Park include Red Rock Canyon with its thick beds of red angillite, Bear's Hump, Vimy Ridge and Sofa Mountain.
- Upper Waterton Lakes which reaches depths of almost 150 meters is the deepest lake in the Rocky Mountains.
- The sediments and volcanics in the Park offer a wide range of characteristics, more than any other Park in the Canadian Rockies. Some of the characteristics include the lack of foothills (where the mountains meet the prairies) and a set of valley and mountain landscapes that are very different and far more diverse than those in other Parks in the Rocky Mountains.

Climate

- The wind is Waterton's most dominant climatic factor. Days without wind are unusual. Some days gales reach as high as 160 kilometers per hour. Fall and winter months are the windiest.
- The winds bring in Pacific fronts along with the famed "Chinook". Waterton receives more Chinooks than any other area of Alberta.
- Waterton receives one of the highest levels of precipitation in the province with an extreme gradient within the Park ranging from averages of 76 centimeters to 152 centimeters.
- July and August in Waterton are warm and dry with average maximum temperatures in the low to mid 20's.

- Winters in Waterton are warmer than those experienced in the rest of Alberta. This is due primarily to the frequency and length of Chinooks.

Ecology

- Waterton is a unique world class ecosystem based on the diversity and combination of the geological/biogeographical characteristics, climatological history, and its position within the Rocky Mountains.
- Waterton has six major ecozones represented within its boundaries including:
    - wetland
    - prairie
    - parkland
    - montane
    - sub-alpine
    - alpine

The dramatic differences between wetland and alpine and across the four other ecozones provides the variety and diversity of features for the picturesque settings in Waterton. It provides an environment for the greatest diversity of plants, birds and animals of any Park in the Rocky Mountains.

Vegetation

- Waterton is one of the richest botanical areas in Alberta. The Park has over 900 species of flora including 15 species of buttercup, 24 species of lily and 22 species of orchid.
- Waterton has species from grasslands and mountains making it very different, including the widest variety of wild flowers, from the other Canadian Rocky Mountain National Parks.
- Waterton's plant communities have more in common with those of coastal British Columbia and Washington state due to its location along a Pacific storm path. Some of the more interesting and unique species in the Park include bear grass, trillium, ninebark,

Oregon grape, bladderwort, Jones' columbine and the Alpine poppy.

- Waterton has 111 of Alberta's rarest flowering plants and 24 of these have not been recorded anywhere else in the province.

Wildlife

- With its broad range of wildlife habitats, Waterton harbours, according to recent count, 234 species of birds, 57 species of mammals and 17 species of fish.
- The abundance and high incidence of wildlife sightings differentiates Waterton from most other National Parks.
- Sheep or deer can be sighted in or near the townsite itself, particularly in the spring and fall.
- Other significant mammals include:
  - grizzly bear
  - black bear
  - mountain lion (cougar)
  - a wide variety of smaller mammals such as ground squirrels, marmot, coyote and beaver.
- Plains bison can be seen in the Park. They pasture in a paddock in summer. They are descendants of a small herd introduced to the Park in 1952.
- Waterton lies alongside two major flyways providing good opportunities for bird watching, primarily during the spring and fall migrations, and throughout the year due to its many indigenous species. There is an osprey nest by the entrance to the Park, within easy viewing by most visitors. There are large numbers of migratory birds in the Park during the fall that can be easily viewed in areas such as Lower Waterton Lake.
- Each of the four main lakes in the Waterton Valley presents a different mix of aquatic life.
- Upper Waterton Lake has 17 species of fish.
- A sunken paddle-wheeler in Emerald Bay (Upper Waterton Lake) harbours a diverse array of aquatic life.
- One of the most unique environments of aquatic, reptile, and amphibian life varieties in the park is Maskinonge Lake.

Native People and Settlement

- Waterton is rich in its settlement history. Over 200 prehistoric sites have been recorded. It has the largest diversity and highest density of archaeological sites in the Rocky Mountain Parks, and is second only to the Crowsnest Pass in Canadian significance. There are several unique sites in Waterton such as fishing stations and vision quests.
- The ancestry of the first inhabitants can be traced back to the northeast corner of Asia. The oldest prehistoric campsite in the Park was found in Red Rock Canyon dating back 8400 years.
- Native peoples moving across Waterton provide an interesting history of their migration for food and other resources, especially over the past 3,000 years.
- The changing habitation patterns of the Kootenays and their ancestors present an interesting story of early inhabitants. Eventually, the Kootenays settled on the western side of the Rocky Mountains.
- People of the Blackfoot nation ventured into Waterton during the 1700's causing conflict with other native tribes.
- With the disappearance of the Bison, native people have settled in communities, farms and reserves in the area. They are contemporary visitors to the Park and some practice spiritual rituals there.
- The first recorded journey by a white man into Waterton was in 1858 by Thomas Blakiston.
- Blakiston named the lakes after Charles Waterton, a noted English explorer and naturalist.
- In 1895, Waterton Lakes Dominion Park was created, Canada's fourth National Park. The earliest visitation statistic indicates 64 people visited in the Park in 1911. In May of 1911, the U.S. government created Glacier National Park to the south.
- Kootenai Brown, a native of Ireland, was the Park's first superintendent. He is a real Canadian folk hero. He was instrumental in having the Waterton area set aside as a National Forest Reserve and later as a National Park.
- A site along the Akamina Parkway to Cameron Lake was the location of the first producing oil well in Western Canada, and the second

in all of Canada. Oil was struck on September 21, 1901. Oil drilling in the Park ceased in 1905.

- Waterton Lakes National Park, in contrast to Banff and Jasper National Parks, was not a creation of the Federal Government and the railroads. It resulted from the efforts of local conservationists when the Federal Government was reluctant to do so with striking of oil within the area.
- Most of the townsite was developed in the 1920's including the Prince of Wales Hotel which opened in 1927.
- The MV International passenger boat began plying Upper Waterton Lake in 1927.
- With the encouragement of Rotary Clubs in Montana and Alberta, the Canadian and American governments established the Waterton-Glacier International Peace Park in 1932 to commemorate the bonds of friendship and goodwill between the two countries.
- The Chief Mountain International Highway connecting the two parks across the border was constructed in 1935 to serve as a pipeline for visitors.
- The International Peace Park Pavilion, an interpretive kiosk in the townsite near the lakeshore, is dedicated to the continuing commitment to international friendship symbolized in the relationship between the two parks.

2.2 Attractions and Activities

Table 2-1 presents attendance and utilization statistics for the Park and selected attractions for the period 1976 to 1988. The statistics are those which are collected by the Canadian Parks Service. These statistics appear to show the following:

- peak attendance to the Park during the period 1976 to 1988 occurred in the early 80's; and
- the utilization of facilities appear to be declining except for the Visitor Centre.

However, discussions with Park officials indicate that collection methods for these statistics are not rigorous or consistent. Therefore, the accuracy of these statistics may be questionable and should be used with care. However, these are the best time-series statistics available to evaluate trends in attendance and utilization of selected facilities in the Park.

Table 2-1
Waterton Lakes National Park
Attendance - Park and Selected Facilities
1976 to 1988 [1]

	Total Park Attendance [2]	Campgrounds	Group Tenting	Visitor Centre	Swimming Pool	Golf Course
1976	346,081	25,515	--	30,749	26,341	7,415
1977	478,403	29,491	1,836	31,716	25,552	12,042
1978	589,264	30,707	4,027	31,088	23,616	12,268
1979	648,890	30,972	3,879	30,101	25,966	12,903
1980	671,110	32,896	3,334	26,368	29,991	14,680
1981	671,442	31,503	2,549	35,143	22,484	12,212
1982	634,953	32,904	2,875	29,302	32,364	13,729
1983	659,063	33,433	4,085	41,581	23,792	14,776
1984	669,720	32,929	4,491	52,540	20,913	14,941
1985	631,279	29,713	2,673	48,548	25,067	14,384
1986	580,834	28,222	2,240	45,696	20,482	11,076
1987	559,378	28,370	2,401	57,629	17,525	10,159
1988	605,338	29,742	1,659	69,718	13,233	Not Avail.
% Change						
1978 to 1988 (10 years)	+ 2.7%	- 3.1%	+124.3%	-44.0%	-58.8%	--
1983 to 1988 (5 years)	- 8.1%	- 11.0%	+ 67.7%	-44.4%	- 59.4%	--

Source: Canadian Parks Service

[1] Statistics supplied by the Canadian Parks Service. The reporting periods end March 31 of each year.

[2] The attendance figures reported by the Canadian Parks Service are not comparable to the estimates based on the surveys conducted for this study.

The results from the 1986-87 Exit Survey provide perspective on visitation, utilization and participation to attractions, facilities, programs and activities. The statistics (percentage of the total estimated population of visitors exiting by private vehicle) as presented in Table 2-2 show the following:

- The most popular attractions were the Prince of Wales Hotel, Cameron Falls, Cameron Lake, Red Rock Canyon, the Marina and the Heritage Centre.
- The most utilized facilities and programs were the hiking trails, park information (visitor) centre, interpretive or education programs and the scenic boat tour. It is important to recognize that 39.7% of the respondents do not utilize facilities or programs while visiting the Park.
- The most popular activities were sightseeing by car, walking, wildlife viewing, photography, shopping, resting or relaxing, dining at a restaurant, visiting Glacier National Park and viewing vegetation/flora.

Of the estimated 105,400 people that stayed overnight in the Park during the survey period, the most popular type of accommodation was the hotel or motel (47.4%) followed by camping (44.8%) and use of homes or cottages (7.0%).

Table 2-2
Major Attractions and Activities by Visitation Utilization and Participation in Waterton Lakes National Park [1]

	% of Total Visitors [2]
Attractions - Visitation	
Prince of Wales Hotel	53.3
Cameron Falls	48.9
Cameron Lake	38.0
Red Rock Canyon	36.5
Marina	30.9
Heritage Centre	24.5
Buffalo Paddocks	16.2
Goat Haunt	13.2
Peace Park Pavilion	10.4
No Attractions Visited	9.2
Golf Course	8.7
Oil City Historical Cairn	7.7
Kootenai Brown's Grave	2.9
Facilities/Programs - Utilization	
No Facilities or Programs	39.7
Hiking Trails	38.3
Park Information Centre	28.7
Scenic Boat Tour	13.9
Interpretive or Education Programs	13.3
Bike or Scooter Rental	5.3
Golf Course	4.0
Boat or Canoe	3.7
Horse Riding Stables	2.9
Convention Centre	0.7
Church Camp	0.4
Use Other Facilities/ Programs	0.4

	% of Total Visitors [2]
Activities - Participation	
Sightseeing by Car	86.1
Walking	75.1
Wildlife Viewing	66.9
Photography	54.6
Shopping	52.9
Resting or Relaxing	43.9
Dining at a Restaurant	43.6
Visiting Glacier Park	41.4
Viewing Vegetation/Flora	40.6
Bird Watching	27.7
Picnicking or Cookouts	23.8
Group Hiking/Backpacking	23.3
Reading	22.5
Visiting Museums	15.7
Drinking at a Restaurant	13.2
Watching T.V.	9.9
Cycling	6.3
Swimming	5.8
Interpretive Theatre	5.7
Boating	4.8
Jogging or Running	4.4
Special Event	4.3
Fishing	4.2
Golf	3.6
Going to Movie	2.9
Horseback Riding	2.9
Canoeing/Kayaking	2.7
Other Sports Activities	2.1
No Activity	1.9
Mountaineering	1.5
Naturalist - Hiking/Backpack	1.5
Tennis	1.4
Sightseeing by Bus	1.1
Dancing	1.1
Cross Country Skiing	0.9
Research	0.7
Scuba Diving	0.4
Snorkelling	0.2
Sailboarding	0.1
Ice Climbing	0.1
Snowshoeing	0.1
Sailing	*
Skating	*
Snowmobiling	*

Source:1986-87 Waterton Exit Survey

* Less than 0.1% of estimated population of visitors.

[1] Based on results of the Exit Survey of private passenger vehicles.

[2] Based on estimated visitation of 325,338 from November 1, 1986 to October 31, 1987.

There are no measures of visitation to specific special events in the Park during 1987. However, the special events included:

Canada Day Celebration	July 1
U.S.A. - Canada Days of Peace and Friendship	July 2-3
Waterton-Glacier International Peace Park Assembly	July 17-19
Waterton Wildlife Week	July 19-25
Waterton Natural History Association Day	August 3
Waterton International Bear Grass Festival	August 22-30
Heritage Ball	Sept. 7
Seniors Day	Sept. 20
International Peace Park Hikes	June 27 - Aug 29 (every Saturday)
Interpretive Programs	June 27-Labour Day

Waterton is a basic full service townsite that includes the following services:

- sporting supplies and hardware;
- self-serve gas bars;
- scenic boat tours;
- accommodation;
- lounges;
- grocery stores;
- a local transportation service for tours and shuttles;
- restaurants and fast food outlets;
- clothing, gift and craft shops;
- book and photographic supply stores;
- bike and boat rentals; and
- a variety of other facilities and services such as horseback riding stables, convention centre, laundromat, golf course, movie theatre, pharmacy and hair dresser.

Of note are the services that are not provided in the Park such as:

- There is no scheduled bus service to the Park although a shuttle is available for connections to scheduled bus service at Pincher Creek or Fort Macleod.
- There are no medical services except for the Canadian Parks Service ambulance.

- The nearest commercial airport for scheduled service is located in Lethbridge, 128 km from Waterton.
- There is no car rental service available in Waterton.

Probably the most significant factor in analyzing the inventory of townsite services and facilities is that most services and facilities do not open until mid May and many close in the two weeks after the September long weekend.

2.3 Linkages to Other Alberta Attractions and Communities

Table 2-3 presents the visitation to other Alberta attractions and communities by visitors to Waterton Lakes National Park as measured by the percentage of visits estimated by the results of the 1986-87 Waterton Exit Survey. It is estimated that 32.0% of Waterton visitors also visited Head-Smashed-In Buffalo Jump. The next most popular attraction for Waterton visitors was West Edmonton Mall followed by the Tyrrell Museum, the Calgary Stampede, and the Mormon Temple in Cardston. It should be noted that nearly 80% of the visitors to Waterton did not visit other attractions in Alberta.

In examining the communities visited by Waterton Lakes National Park visitors, the most popular other community was Banff followed by Calgary, Jasper, Cardston and Lethbridge. Nearly 58% of all Waterton Park visitors did not visit another community in Alberta.

Table 2-3
Visitation to Other Alberta Attractions and Communities by Visitors to Waterton Lakes National Park [1]

	% of Total Visitors
Attractions *	
Head-Smashed-In Buffalo Jump	32.0
West Edmonton Mall	16.5
Tyrrell Museum	12.8
Calgary Stampede	11.6
Mormon Temple	11.6
Frank Slide Centre	8.9
Columbia Icefields	8.8
Calgary Zoo	6.9
Nikka Yuko Gardens	4.9
Other Attractions in Calgary	4.8
Heritage Park (Calgary)	4.5
Communities **	
Banff	34.6
Calgary	29.3
Jasper	20.9
Cardston	18.2
Lethbridge	18.2
Lake Louise	16.9
Edmonton	14.2
Fort Mcleod	13.9
Pincher Creek	8.5

* Based on 53,752 visitors to Waterton that travelled or planned to travel to other attractions in Alberta.

** Based on 110,743 visitors to Waterton that travelled or planned to travel to other communities in Alberta.

[1] Based on results of Exit Survey of private passenger vehicles conducted from November 1, 1986 to October 31, 1987 and a total estimated visitation of 325,338.

Source: 1986-87 Waterton Exit Survey.

2.4 Tourism Implications of Plans and Policies

There are several plans and policies adopted by all three levels of government which ultimately affect the way in which tourism can be developed and marketed in Waterton Lakes National Park. These plans and policies reflect the broad needs and interests of the people resident in the region, Alberta and Canada. It is important to understand the essence and implications of these plans and policies with respect to tourism opportunities in the Park. For this reason, the plans and policies affecting the use and development of the Park and the surrounding area have been reviewed and a synopsis of them is presented in Appendix I. The range of plans and policies reviewed include the Alberta Government's Statement on Tourism, Canadian Parks Service (Parks Canada) Policies and Plans, Waterton Lakes National Park Plans, Glacier National Park Plans, and Land Use Plans and By-laws for areas adjacent to the Park in Alberta.

The existing policy and planning framework and the progress that is being made through various programs, such as those of the Waterton Biosphere Reserve, and the complementary policies of adjacent jurisdictions and municipalities and the unique position of being the world's only International Peace Park will serve to maintain the Park's overall market position as a jewel of the Rocky Mountains.

The Park stakeholders will need to ensure their input into the preparation and revision of plans, policies and regulations prepared by all levels of government and the private sector to protect the fragile and marketable resources contained in and around Waterton Lakes National Park.

A variety of other policies and regulations affect the future development and protection of land within and adjacent to the Park. Certainly, any future plans that may be developed by the Blood Indians for Indian Reserve 148A may have an impact on the Park. Alberta Forest Service, and Fish and Wildlife policies and regulations, and transportation projects are examples of other policies, plans and developments that may affect Waterton Lakes National Park.

In summary, the existing planning and policy framework provides the following:

- The Province of Alberta and the Government of Canada have placed a high priority on the development of the tourism industry. Waterton Lakes National Park is part of the product image that Canada and Alberta can promote and sell nationally and internationally.

- Canadian Parks Service policies and management have recognized the importance of marketing the Parks to maintain interested constituencies in Canada and around the world, especially those interested in preserving environments for future generations to see and enjoy and at the same time recognizing the importance of maintaining and improving visitation to our Parks.
- The Park Management Plan and Visitor Services Centre Development Plan supports enhancement of the product by implementing policies and directions which will make Waterton an even more desirable tourist destination. For example, the architectural motif and guidelines will enhance the character and image of the townsite which is the main destination within the Park. The Canadian Parks Service policies also show concern for the quality and level of service provided by accommodation and other services to visitors in the townsite. The policies and directions prefer extension of use into the shoulder and winter seasons, rather than achieving a greater concentration and over use of the Park during the short summer season. This is quite compatible with general business and tourism development objectives. The Canadian Parks Service is also interested in improving and increasing the services for visitors through private and not-for-profit organizations.
- The Land Use Bylaws and General Municipal Plans for areas adjacent to the Park reinforce the maintenance of the Park's character and image. However, the M.D. of Cardston is considering allowing commercial development along the east edge of the Park which will detract from the Park's overall image. Yet, on the other hand, Park policies restrict development within the Park and in essence create development pressure for accommodation and tourist services on the Park's boundaries or in communities too far away from the Park to offer viable and proper service. It should also be understood that redevelopment and improvement of the commercial facilities and services in the townsite will likely occur and thereby make it more difficult for commercial operations on the edge of the Park to do well. Given the choice and assuming some premium to the cost of staying in the Park, visitors will almost always choose accommodation and services within the Park. Unfortunately, development sites outside the Park do not provide the same picturesque setting the townsite has within the Park. None of the lands

outside the Park provide the diversity and interest that would allow longer tourist seasons to support economically viable development. In addition, there is no other economic reason for development and services to exist immediately outside the Park other than to serve tourists.

2.5 Tourism Opportunities Identification and Assessment

Based on a review of the Waterton and area resources, relevant plans and policies, surveys of visitors and potential markets, and public open houses and workshops, a number of tourism development opportunities can be identified. Table 2-4 summarizes the broader opportunities for Waterton based on the aforementioned sources. A brief assessment or rationale for each opportunity is also provided. These opportunities form the foundation for identifying target markets for Waterton in Section 3.0 and specific elements of the marketing strategy presented in Section 4.0.

Table 2-4
Waterton Lakes National Park
Tourism Opportunities Identification and Assessment

Opportunity	Assessment/Rationale
The unique characteristics of Waterton relative to other Parks in the Rocky Mountains.	• Many unique and very significant natural and human resource elements. • "Where the Mountains Meet the Prairies". • World's first International Peace Park.
Package and market natural and human resource features.	• The unique and diverse array of cultural and biophysical features of the Park can be packaged for more discerning travellers. • Increasing interest in the environment and an understanding of its systems and elements. Waterton is one of the most unique ecosystems in North America. • Designated part of a Biosphere Reserve by UNESCO.
Low visitation to and expenditures in Park outside of summer.	• 70.1% of visitation and 85.4% of visitor expenditures occurred during the 85 day period, June 15 to September 7, 1987. • Low utilization of all facilities outside of summer season. • Plans and policies recognize little potential, due to the fragile resources to expand visitation significantly during the summer. • Greatest potential for growth is during the spring and fall seasons.
Nearly 2.0 million visits per annum to Glacier National Park.	• Visitors to Glacier National Park comprise a large portion of the visitors to Waterton. A large percentage of visitors to both Parks were not aware of the facilities, services and attractions in Waterton. • Many of the attractions in Waterton appeal to the general touring/sightseeing market.
High participation and interest in nature programs, activities and facilities makes Waterton Lakes National Park an important destination.	• Growing markets for Alberta's product - the wilderness and natural environments. • A high percentage of visitors to Waterton participate in nature programs and activities.
Visitor needs are not fulfilled outside of the main summer period. Businesses can increase sales.	• Most facilities and services (private and public) are not available outside of the main summer period. • Visitors to the Park outside the main summer period identified the need for facilities and services.

Table 2-4 (Continued)
Waterton Lakes National Park
Tourism Opportunities Identification and Assessment

Opportunity	Assessment/Rationale
Visitors seek means of dealing with changing and extreme weather conditions.	• The weather in Waterton is one of its most dynamic features. • There are few facilities and services in Waterton which allow visitors to fully enjoy the Park during inclement weather.
Unique environment, services and facilities relative to other National Parks in the Rocky Mountains (positioning opportunity).	• Most markets, including major regional markets, are not aware of the unique features of Waterton relative to other National Parks in the Rocky Mountains. • Waterton offers a very different environment, character and range of services.
The Waterton townsite has a unique architectural character and scale. Well located relative to natural resources, facilities and attractions.	• The Waterton townsite is a low density, relatively underdeveloped service centre within a National Park located at the foot of mountains and on the shores of a lake within a beautiful valley. • Plans and policies recognize these characteristics and provide guidelines for development and redevelopment.
Strong business association committed to promoting tourism.	• A large majority of Waterton businesses belong to the Waterton Chamber of Commerce and Visitors Association. • Many promotional initiatives have been implemented by the Association.
Trail of the Great Bear concept initiated.	• Waterton is one of the few remaining homes for grizzly bears in the region. • Waterton leaseholders and business people have been major proponents of a major touring route from Yellowstone National Park to Banff National Park called the "Trail of the Great Bear".
Nearby gateway and service centres.	• The Park is only three hours drive from Calgary and 75 minutes drive from Lethbridge. • Pincher Creek and Cardston (30 minutes drive) provide a full range of goods and services for visitors. • Nearby Twin Butte and Mountain View (hamlets) provide a limited range of goods and services.

Table 2-4 (Continued)
Waterton Lakes National Park
Tourism Opportunities Identification and Assessment

Opportunity	Assessment/Rationale
Strong Tourist Association in Region.	• The Chinook Country Tourist Association actively promotes Waterton with a large membership of municipalities, businesses and individuals. • The Association serves as a resource and coordinating body for many cooperative promotions amongst industry partners in the region.
Other major attractions in region and Province.	• Glacier National Park, Head-Smashed-In Interpretive Centre, Nikka Yuko Japanese Gardens, Mormon Temple, and the Frank Slide Interpretive Centre are the major attractions in the immediate area of the Park which also help to draw visitors to Waterton. • The Tyrrell Museum in Drumheller, West Edmonton Mall, Calgary Stampede and Heritage Park in Calgary are other attractions which help to draw visitors or complement Waterton as a destination in Alberta.
Available lots within townsite for more accommodation, facilities and services.	• Some of the facilities and services in Waterton (ie. campgrounds, hotels, recreation amenities) need to be expanded to meet the needs of visitors.
Strong image of Prince of Wales Hotel.	• The postcard picture shot of the Prince of Wales Hotel on the west side of the Upper Waterton Lake and Valley has been seen around the world through promotions by the Provincial and Federal governments and the private sector. The Hotel provides a centerpiece for a landmark image of Waterton.
Increasing demand for nature education programs and services.	• Globally, tourists are placing a higher priority on nature as a theme for visits to destinations. • The Waterton Natural History Association provides more intensive programs for visitors which complement visitor services provided by the Canadian Parks Service.
Cooperative adjacent municipalities.	• Plans and bylaws have been adopted by jurisdictions which control development of adjacent lands which will likely protect the character and resources of the Park.

Table 2-4 (Continued)
Waterton Lakes National Park
Tourism Opportunities Identification and Assessment

Opportunity	Assessment/Rationale
Little promotion outside of basic information service pieces, limited general advertising and public relations.	• Previous experience was the most important source of information influencing visitors to the Park. • Waterton is little known compared to the other Canadian Rocky Mountain Parks.
Capitalize on tourism development and promotion by all levels of government.	• There is stated interest and financial resources currently dedicated to tourism by all levels of government. • Communities, businesses, attractions, tourist industry associations, and senior levels of government will cooperate in most promotions.
Good roads to the Park from major centres in Alberta and Montana.	• The Park has good year-round road access (despite closure of the Chief Mountain border crossing during most of the year).
Waterton is a major destination and most visitors are day visitors.	• Waterton was the main trip destination for 69.5% of its visitors. 59.8% of the visitors did not stay overnight in Waterton . The average number of nights spent in Waterton for those that stayed was 3.5.
Most popular attraction in southwest Alberta.	• The next most popular attraction is Head-Smashed-In Interpretive Centre with visitation in the range of 120,000 to 150,000 per annum.
Promote the high satisfaction level by visitors to Park.	• 81% of the visitors rated their visit from very good to excellent. • 59.7% of the visitors previously visited Waterton.

3.0 WATERTON MARKETS

This section of the strategy report summarizes the existing visitor profiles and identifies the target market segments for Waterton Lakes National Park.

3.1 Visitor Profile

The visitor profile is based on the results from four surveys conducted during the period November 1, 1986 through December 15, 1987 including:

- Personal interview survey of 1,666 visitors exiting the Park during the period November 1, 1986 through October 31, 1987. This survey was conducted to provide a comprehensive profile of visitors, their interests and their needs.
- A survey of 401 motorcoach tour passengers and 72 tour escorts and drivers during the summer of 1987. This survey was conducted to profile motorcoach tour visitors; measure key trip characteristics, perceptions, attitudes, satisfaction levels and behaviour patterns; and estimate the population of motorcoach tours and visitors to Waterton Lakes National Park.
- A telephone survey of residents in Calgary, Medicine Hat, Lethbridge and Great Falls, Montana to determine awareness, interest and use levels for Waterton. This survey was conducted during the summer and fall of 1987.
- A survey of visitors crossing into Alberta from the United States at Carway and Chief Mountain border crossings conducted during August, September and October of 1987. The purpose of this survey was to determine the awareness level, intention to visit, past visit pattern and satisfaction level with Waterton prior to their trip into Alberta.

The methodologies and results of these surveys are available upon request.

Based on the results of the Exit Survey and the Survey of Motorcoach Visitors, it was estimated that there were 334,618 visitors (325,338 by private vehicle and 9,280 by motorcoach) to the Park during the period November 1, 1986 to October 31, 1987. The visitation and expenditure levels for visitors exiting the Park by private vehicle by season are summarized in Table 3-1 and illustrated in Figure 3-1. It should be noted that the counting method for traffic during the survey period is different from the method employed by the Park on a regular basis. The main difference is that the Park's count is based on all vehicles (including non-visitors), the use of a passengers per vehicle factor that has not been verified and vehicle counters that are not placed to measure traffic going in and out of the main area of the Park. The Canadian Parks Service visitor count is over 250,000 visitors higher than the estimate determined by the Exit Survey. Therefore, the visitation for the survey period cannot be compared to prior years' visitation. The 1986/87 estimate should serve as a good benchmark for monitoring visitation providing the Canadian Parks Service establishes a comparable visitor traffic counting system similar to the one used for the Exit Survey.

Table 3-1
Waterton Lakes National Park
Visitors Exiting by Private Vehicle
Visitation and Expenditure Levels by Season
November 1, 1986 to October 31, 1987

	Number	%	$ per Visitor	Total $	%
Winter November 1 to April 14 (165 days)	17,897	5.5	2.11	37,800	0.4
Spring April 15 to June 14 (61 days)	55,426	17.0	15.08	836,000	9.4
Summer June 15 to September 7 (85 days)	228,071	70.1	33.24	7,580,700	85.4
Fall September 8 to October 31 (54 days)	23,944	7.4	17.60	421,400	4.7
TOTAL	325,338	100.0%	$27.32	$8,876,000	100.0%

Source: Waterton Exit Survey, 1986/87

Note: Expenditure per visitor and total expenditure are rounded.

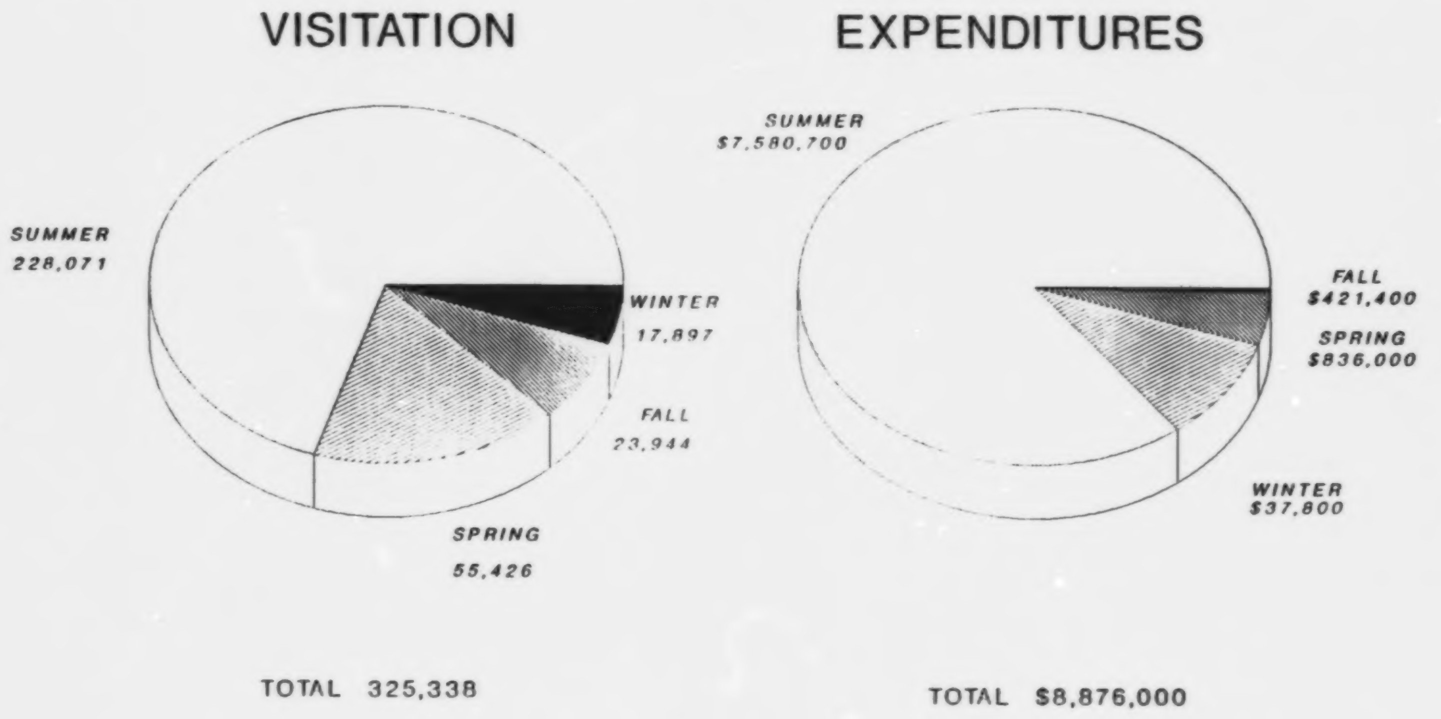
Based on the survey results it is estimated that visitors by private vehicle spent an estimated $8.9 million or $27.32 per visitor. If the average per visitor expenditure in the summer is applied to the motorcoach visitors, an additional $308,000 (rounded) was spent in the Park for a total of $9.2 million during the period November 1, 1986 to October 31, 1987.

The origin of Park visitors based on the Exit Survey can be summarized as follows:

	%
Southern Alberta	35
Calgary	9
Edmonton	4
Rest of Alberta	5
Montana	6
California	4
Other Northwest United States	5
Rest of United States	19
Saskatchewan, Manitoba and B.C.	9
Rest of Canada	1
Europe and Other Countries	3
	100

Figure 3-2 illustrates the origin of Park visitors.

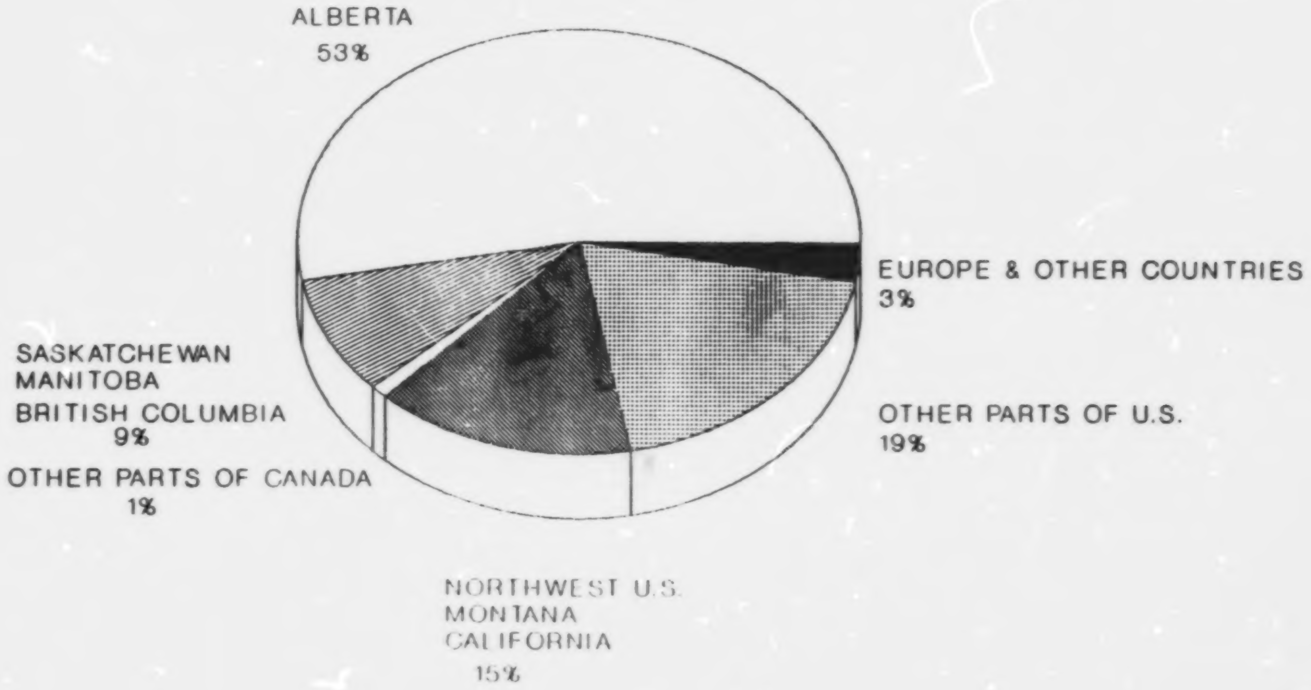
WATERTON LAKES NATIONAL PARK
VISITATION AND EXPENDITURES BY SEASON
VISITORS EXITING BY PRIVATE VEHICLE
NOVEMBER 1, 1986 TO OCTOBER 31, 1987



Source: 1986-87 Waterton Exit Survey

FIGURE 3-1

ORIGIN OF WATERTON PARK VISITORS
VISITORS EXITING BY PRIVATE VEHICLE
NOVEMBER 1, 1986 TO OCTOBER 31, 1987



Source: 1986-87 Waterton Exit Survey

FIGURE 3-2

The key characteristics of private vehicle and motorcoach visitors and some implications are summarized in the concluding remarks to the reports on these surveys. These remarks are as follows:

Exit Survey

The Waterton Exit Survey provides an excellent data base for tourism planning and marketing for Waterton Lakes National Park. It provides a basis to estimate the volume and structure of total visitation to the Park during the survey period, a socio-demographic profile of visitors including their travel/trip characteristics and behaviours and the level and nature of their expenditures, and a monitor of their satisfaction/dissatisfaction with their visit to the Park. The highlights of the Exit Survey findings are as follows:

1. Overall, southern Alberta is the most significant existing market for Waterton Lakes National Park at 34.9% of total visitation. Calgary is second at 9.2%. Americans comprise 34.3% of all visitors with California, Montana and the northwestern States being the most significant markets. It would appear that these existing markets provide excellent potential for further growth and should be the focus of Waterton's marketing efforts over the next few years.

2. Family and relatives travelling together was the most significant travel party visiting Waterton Lakes National Park. The "couple" was the second most significant travel party, especially in the fall. It would appear that there is an excellent marketing opportunity to sell more "couples getaways" to Waterton, especially during the spring and fall periods, special family packages during the summer and shoulder seasons and wildlife viewing and photography packages in winter, spring and fall.

3. The Waterton visitor is quite well educated with higher than average personal and household incomes. Nearly 19% of the visitors surveyed were retired, with professional, homemaker, technical, clerical, sales and manager/owner occupations being the most significant other occupations.

4. Nearly two-thirds of all visitors spent seven or less nights away from home on their trips which included a visit to Waterton. Nearly 60% visited Waterton for a day. The average annual length of stay for all visits is 1.4 nights. There is an excellent opportunity to convert some of the day users into overnight stays especially during the spring and fall seasons.

5. Nearly two-thirds of all visitors surveyed made their decision to visit Waterton within one week of their arrival at the Park. This is not surprising since many of the visitors were coming from Glacier National Park in the United States and from southern Alberta. It also indicates that there is a great opportunity to increase visitation by travellers passing through southern Alberta and Glacier National Park.

6. The primary trip purpose of visitors was vacation (53.8%). Nearly 36% visited the Park for day use recreation or social activities. The existing convention and meeting market is very small and certainly has considerable potential to increase, especially for associations and corporations wanting to meet in a remote yet accessible location.

7. Waterton is in itself a major destination for visitors. Nearly 70% of the trips were made primarily to visit Waterton itself. Other important destinations were Banff, Calgary and Jasper. From a marketing perspective, Waterton should pursue cooperative promotions with Banff, Calgary and Jasper.

8. The most popular visitor activities were sightseeing by car and walking. Other significant activities were wildlife viewing, photography, shopping, resting/relaxing, restaurant dining, vegetation/flora viewing and visiting Glacier National Park in the United States.

9. The most popular facilities and programs in the Park were hiking trails, the information centre, the scenic boat tour and interpretive/educational programs. The most popular sites and locations

visited in the Park were the Prince of Wales Hotel, Cameron Falls, Cameron Lake, Red Rock Canyon, the marina and the Heritage Centre. Due to the high level of day use visitors to the Park, over 64% of the visitors did not use any form of accommodation. Nearly 45% of the visitors camped in the Park and over 47% used hotels or motels.

10. In terms of sources of information influencing visitors, previous experience was the most important source. Other important sources in declining order of priority were friends and relatives, tourist information centres, maps and atlases, Glacier National Park, travel articles and travel guides. These results may indicate that advertising programs certainly have not been effective in drawing visitors to the Park. However, the results do demonstrate the importance of using basic promotions and awareness programs that are relatively inexpensive to implement.

11. Head-Smashed-In Buffalo Jump, West Edmonton Mall and the Tyrrell Museum were the most popular other Alberta attractions visited by Waterton visitors. Waterton should investigate cooperative promotions with these attractions.

12. Nearly 81% of the visitors to the Park rated their Waterton experience as excellent or very good. It should be the objective of Waterton businesses and the Park's Service to insure that this satisfaction level is maintained.

13. Visitors liked the scenery and view, the wildlife, the quiet relaxing atmosphere, the weather and the mountains the most. What they liked least was the weather, the wind, the fact that various facilities and services in the Park were not open, and high prices. The Waterton marketing program should highlight what people like the most, especially in terms of differentiating the Park from other Park destinations. Promotional materials should also inform the visitor of changing weather conditions and services available outside of the summer months.

14. Visitor suggestions for improvements included more or better camping facilities, more facilities and activities and more places open outside of the summer months.

15. During the survey period, there was an estimated 118,112 vehicles (or travel parties) that expended an estimated $8.9 million in the Park. The total annual visitation is estimated at 325,338.

The summary profile of visitors exiting by private vehicle during the survey period is presented in Appendix II.

Survey of Motorcoach Visitors

The motorcoach survey was successful in obtaining responses from 401 motorcoach tour visitors. The results of this survey provided some interesting insights which will be helpful in developing a better product for this particular segment of the market and conducting promotions to attract more motorcoach tours. It is noted that the survey may underestimate the responses related to the Prince of Wales Hotel since a major tour company from the United States did not fully participate in the survey. The highlights of the survey findings are:

1. An estimated 290 motorcoaches entered the Park during the period November 1, 1986 to October 31, 1987, based on a survey of accommodation and boat tour operators. This represents approximately 9,280 motorcoach visitors based on an average of 32 passengers per motorcoach.

2. Most of the motorcoach tours visit and stay overnight at the Prince of Wales Hotel.

3. The largest segment of respondents originated from Alberta (18%), followed by California (11%), New Jersey (7%), Florida (6%) and New York (6%). The typical passenger could be described as being a retired, well-educated person over the age of 55 whose household's annual income is over $40,000 Cdn.

4. Most of the visitors were on a vacation with their trip having an average of 10 nights away from home. Not all of these nights were necessarily spent on the motorcoach tour.

5. Most of the tours (54%) were purchased through a travel agent but over one-quarter (30%) were purchased directly from the tour operator. Over 52% of the respondents made their decision to go on their trip within three months of their departure. This indicates that promotions targeted at tour operators and travel agents including trade shows and familiarization tours will likely yield the best results. The timing of the tour passengers decisions indicate that accommodation operators should maintain some flexibility in booking and payment for rooms by tour operators, especially those that are developing new packages.

6. The inclusion of Waterton Lakes National Park in a tour was important in the selection of the tour. Therefore, Waterton should be used as a feature attraction for tour packaging and promotions.

7. Given the length of trip and the origin of the motorcoach passengers, the one night stay was predominant. Efforts should be made to extend the length of stay during the day by packaging and promoting specific services and programs for motorcoach tours such as meal packages, box lunches, step-on guide service, meet and greet programs and receptions, and special events and interpretive services for tour groups.

8. The satisfaction level of motorcoach visitors is slightly higher than for all visitors surveyed during the Exit Survey.

9. The scenery is the big selling feature in the Park. Other selling features are the boat trip, friendly people, Prince of Wales Hotel and the Rockies.

10. The biggest deterrent to visitation may be the weather. It is very important that activities be planned for motorcoach tour passengers during inclement weather. Many passengers were quite satisfied with their stay in Waterton. Passengers suggested that

improvements could be made in: food service, the boat ride, price levels, modernizing the Prince of Wales Hotel, commercial services, and amenities in hotel/motel rooms. There is also a need to provide better transportation service between the Prince of Wales Hotel and the townsite.

3.2 Target Market Segments

The results of the surveys, a review of other relevant tourism research reports and input from leaseholders, Canadian Parks Service personnel and other intersted individuals and groups were used to identify the following target markets:

Regional Tourism and Recreation Segment

- largely from southern Alberta
- visiting primarily for one or two activities
- visits Waterton frequently and during different times of the year
- visits Waterton for a few hours and spends very little on goods and services
- main trip destination is Waterton
- year-round visitation potential

Relaxation and Adventure Getaway Segment

- mainly from larger urban centres in Alberta and the Northwest United States
- upper socio-economic group and well educated
- looking to get away from the hustle and bustle of the city - rest and relaxation
- main trip destination is Waterton
- will stay two or three nights mainly on weekends
- wanting to visit when the park is not all that busy
- year-round visitation potential

General Touring Segment

- travelling to several destinations during a trip of a week to two weeks in duration
- enjoys sightseeing by car
- interested in Waterton because it is a National Park and in close proximity to the U.S. and Glacier National Park

- mainly from the United States
- visits the Park mainly during the summer with some potential to expand into spring and fall.

Outdoors Segment

- looking for a unique outdoors experience
- wants to "see and experience" beautiful scenery, wildlife and geography of area
- visits National Parks regularly
- also interested in townsite services and accommodations
- interested in educational and informative interpretive programs
- willing to travel great distances to "see and experience" something unique
- visits the Park mainly during the summer with some potential to expand into spring and fall.

Conferences, Seminars and Meetings Segment

- mainly Alberta and Montana based organizations, corporations or groups
- 100 attendees or fewer
- interested in a remote location
- wanting to change from standard city or other Rocky Mountain Park locations
- good potential to expand visitation during spring and fall.

Motorcoach Tour Segment

- passengers on tours originating in Calgary or centres in the Northwest United States
- older - 45 + years
- travelling to see many destinations in Canada and the United States
- did not pick tour mainly because Waterton was a destination
- want to travel primarily during the summer months
- visits the Park mainly during the summer with limited regional potential to expand into year-round tours.

The market profiles have been carefully devised based on the results of the market surveys and an analysis of tourism trends and opportunities. These market segments are the target markets in the Waterton Tourism Marketing Strategy presented in Section 4.0. More detailed national and specific marketing objectives for each market segment are also presented in Section 4.0.

4.0 THE MARKETING STRATEGY

The purpose of this section is to present the overall marketing mix to satisfy the identified needs of the target markets. It involves adjusting the four p's of marketing - product, price, place and promotion. Specifically, the four p's involve the following:

- Product Enhancement - changing or improving the tourism attractions, services and hospitality in Waterton to better meet the needs of the target markets within the parameters of the Park's overall management plan.
- Price Adjustment - improving the value for money position in the minds of the target markets relative to competing travel destinations.
- Place Adjustment - improving physical access or distribution channels for consumers and the travel trade to make it easier for the target markets to visit Waterton Lakes National Park.
- Promotion Adjustment - communicating with the target markets to attract them to Waterton Lakes National Park. Emphasis is placed on differentiating the product from others and selling the benefits of visiting Waterton Lakes National Park.

This section includes a discussion of the overall marketing image, marketing objectives, strategic directions and strategies for general marketing and the marketing mix for the target markets.

4.1 Marketing Image

The basic marketing image which differentiates Waterton Lakes National Park from other National Parks and destinations can be described as follows:

- scenic beauty of the Canadian Rocky Mountains showing a rapid change from the prairies to the mountains. The Park also features a large u-shaped glaciated valley with lakes between mountains;
- a full range of basic accommodation and other services provided within the heart of the Park;
- abundance of visible wildlife;
- unique character of the townsite consistent with the design and materials used in the construction of the Prince of Wales Hotel;

- small, less crowded Park; and
- lots to see and do within a short distance of the accommodations and services.

Probably the most popularized image of Waterton Lakes National Park is that of the Prince of Wales Hotel featured on the promontory when viewing Upper Waterton Lake to the south and surrounding mountain peaks. This image of Waterton has gained international exposure and recognition and has been featured by Alberta Tourism in its national and international advertising campaign for 1988. The Prince of Wales Hotel is the unique landmark and feature within the Park, making a statement about the Park representing its majestic splendor. The main weakness in presenting this image is that it does not provide the impression that there is a townsite with a full range of accommodation and services within the Park and it certainly does not highlight other differentiating factors such as the abundant visible wildlife, the outdoor recreation activities, interpretive programs and services, etc. However, this image is very positive and if there is one picture that can make a strong statement that is attractive to visitors and reinforces positive images for the Park, this particular image of Waterton does the job. The Waterton Chamber of Commerce and Visitors Association is capitalizing on the publicity provided by Alberta Tourism by linking their promotions to the Alberta campaign. They are using the slogan, "Waterton, in all her majesty" for their 1988 promotions.

Based on the Waterton Tourism Study research, and input from participants in workshops conducted for this study, other common elements of a message to Waterton target markets may include:

- Waterton-Glacier International Peace Park;
- quiet uncrowded mountain National Park with a full service townsite;
- an ecosystem of international significance;
- proximity to Glacier National Park in the United States;
- take the "Going-to-the-Sun" Road en route to Waterton Lakes National Park;
- the abundance of visible wildlife and wild flowers in the Park;
- the accessible and extensive trail system with connecting trails into Glacier National Park (U.S.);
- international scenic boat cruise on Upper Waterton Lake;

- interpretive services;
- other amenities in the Park such as an 18 hole golf course, tennis courts, heated swimming pool, local transportation service, theatres, boat rentals, and a riding stable;
- a wide range of accommodation and camping/RV facilities; and
- proximity to the U.S./Canada border and to other major recognized destinations and attractions such as Calgary, Banff National Park, Calgary Stampede, Head-Smashed-In Buffalo Jump, West Edmonton Mall, British Columbia and Lethbridge.

4.2 Marketing Objectives

Maintain High Level of Visitor Satisfaction

Nearly 81% of the visitors to Waterton Lakes National Park rated their overall level of satisfaction as very good or excellent. While 3% of the visitors rated their overall satisfaction as fair or poor, efforts should be made to maintain or enhance this level of satisfaction in Park visitation while maintaining the integrity of the Park. At the same time, a more viable situation for commercial operations in the Park must be established based on an enhancement of the overall image of the Park's facilities and services designed to meet the need of the target markets.

Increase Visitation and Expenditures Primarily During Spring and Fall Periods

In order to maintain the integrity of the Park's resources and yet recognizing that the federal government is reducing the budget for maintenance and improvement of the Park's infrastructure and delivery of program services, the greatest opportunities for increasing visitation and expenditures exist during the spring and fall months. However, the Canadian Parks Service are implementing staff reductions that affect the ability of the Park to provide service during these periods. For instance, many facilities in the Park will close on September 18 in 1988, two weeks earlier than in 1987. There is considerable excess capacity in infrastructure, especially commercial accommodation and services during these seasons. Increases in visitation during the spring and fall will increase the overall viability of the businesses and their ability to improve operations and quality of facilities. Through the implementation of this marketing strategy, the visitation and expenditure levels are projected to increase as shown in Table 4-1. The visitation projection is illustrated in Figure 4-1.

The basis and assumptions for these projections are as follows:

- The existing summer visitation level already stresses existing services and facilities in the Park. It is assumed that any excess capacity during the summer will be utilized through increasing length of stay and higher expenditures. Visitation during the summer is expected to stabilize at 230,000 (+ or - 10%).
- Initially, the greatest potential for growth is identified in the fall, then the spring and winter.
- Increased expenditures are expected to be driven by inflation at 5% per annum and increased spending as a result of more businesses remaining open in the shoulder seasons and year-round.

In addition to the projection of visitors exiting by private vehicle, visitation by motorcoach visitors is expected to increase by 2% to 3% per annum from a base of 9,280 in 1986/87. This should be due largely to increased marketing of packages for tour groups in fall and spring and to regional groups during the winter. Assuming the same average expenditure per visitor as derived from the Exit Survey for the summer period, the visitation and expenditure level by motorcoach visitors are expected to increase as follows:

	Visitation	Estimated Expenditures
1986/87 Actual	9,280	$308,000
1991/92 Projected	10,500	$441,000
1993/94 Projected	11,000	$509,000
1998/99 Projected	12,500	$738,000

TABLE 4-1
EXISTING AND PROJECTED VISITATION AND EXPENDITURES
VISITORS EXITING BY PRIVATE VEHICLE *

WATERTON TOURISM MARKETING STRATEGY

	Actual 1986/87					Projected for 1991/92				
	Visitation		Expenditures			Visitation		Expenditures		
	No.	%	$ per Visitor	Total $	%	No.	%	$ per Visitor	Total $	%
WINTER November 1 to April 14 (165 days)	17,897	5.5	2.11	37,800	0.4	26,000 (increase of 8.0% per annum)	6.8	5.25 (increase of 20% per annum)	136,000	1.0
SPRING April 15 to June 14 (61 days)	55,426	17.0	15.08	836,000	9.4	78,000 (increase of 7.0% per annum)	20.4	24.00 (increase of 10% per annum)	1,872,000	14.4
SUMMER June 15 to September 7 (85 days)	228,071	70.1	33.24	7,580,700	85.4	230,000 (stablized attendance is projected fluctuating + or - 10% per annum)	60.2	42.00 (increase of 5% per annum)	9,660,000	74.2
FALL September 8 to October 31 (54 days)	23,944	7.4	17.60	421,400	4.7	48,000 (increase of 15.0% per annum)	12.6	28.25 (increase of 10% per annum)	1,356,000	10.4
TOTAL	325,338	100.0%	$27.32	$8,876,000	100.0%	382,000	100.0%	$34.09	$13,024,000	100.0%

* This excludes motorcoach tour passengers. Years ending October 31st.

Source: Data from 1986/87 from Waterton Exit Survey and Passenger Vehicle Count at Park Gate.
All percentage increases are average per annum since the previous existing or projected year.

TABLE 4-1 (cont'd)
EXISTING AND PROJECTED VISITATION AND EXPENDITURES
VISITORS EXITING BY PRIVATE VEHICLE

WATERTON TOURISM MARKETING STRATEGY

	Projected for 1993/94					Projected for 1998/99				
	Visitation		Expenditures			Visitation		Expenditures		
	No.	%	$ per Visitor	Total $	%	No.	%	$ per Visitor	Total $	%
WINTER November 1 to April 14 (165 days)	28,000 (increase of 3.0% per annum)	7.0	6.00 (increase of 10.0% per annum)	168,000	1.1	32,000 (increase of 2.5% per annum)	7.4	8.50 (increase of 7.0% per annum)	272,000	1.3
SPRING April 15 to June 14 (61 days)	88,000 (increase of 6.0% per annum)	22.1	29.00 (increase of 10.0% per annum)	2,552,000	16.9	107,000 (increase of 4.0% per annum)	24.7	40.75 (increase of 7.0% per annum)	4,360,000	20.6
SUMMER June 15 to September 7 (85 days)	230,000 (stablized + or - 10%)	57.6	46.25 (increase of 5.0% per annum)	10,638,000	70.4	230,000 (stablized + or - 10%)	53.1	59.00 (increase of 5.0% per annum)	13,570,000	64.1
FALL September 8 to October 31 (54 days)	53,000 (increase of 5.0% per annum)	13.3	33.00 (increase of 8.0% per annum)	1,749,000	1.69	64,000 (increase of 4.0% per annum)	14.8	46.25 (increase of 7.0% per annum)	2,960,000	14.0
TOTAL	399,000	100.0%	$37.86	$15,107,000	100.0%	433,000	100.0%	$48.87	$21,162,000	100.0%

Source: Data from 1986/87 from Waterton Exit Survey and Passenger Vehicle Count at Park Gate.
All percentage increases are average per annum since the last existing or projected year.

WATERTON LAKES NATIONAL PARK
VISITATION PROJECTION

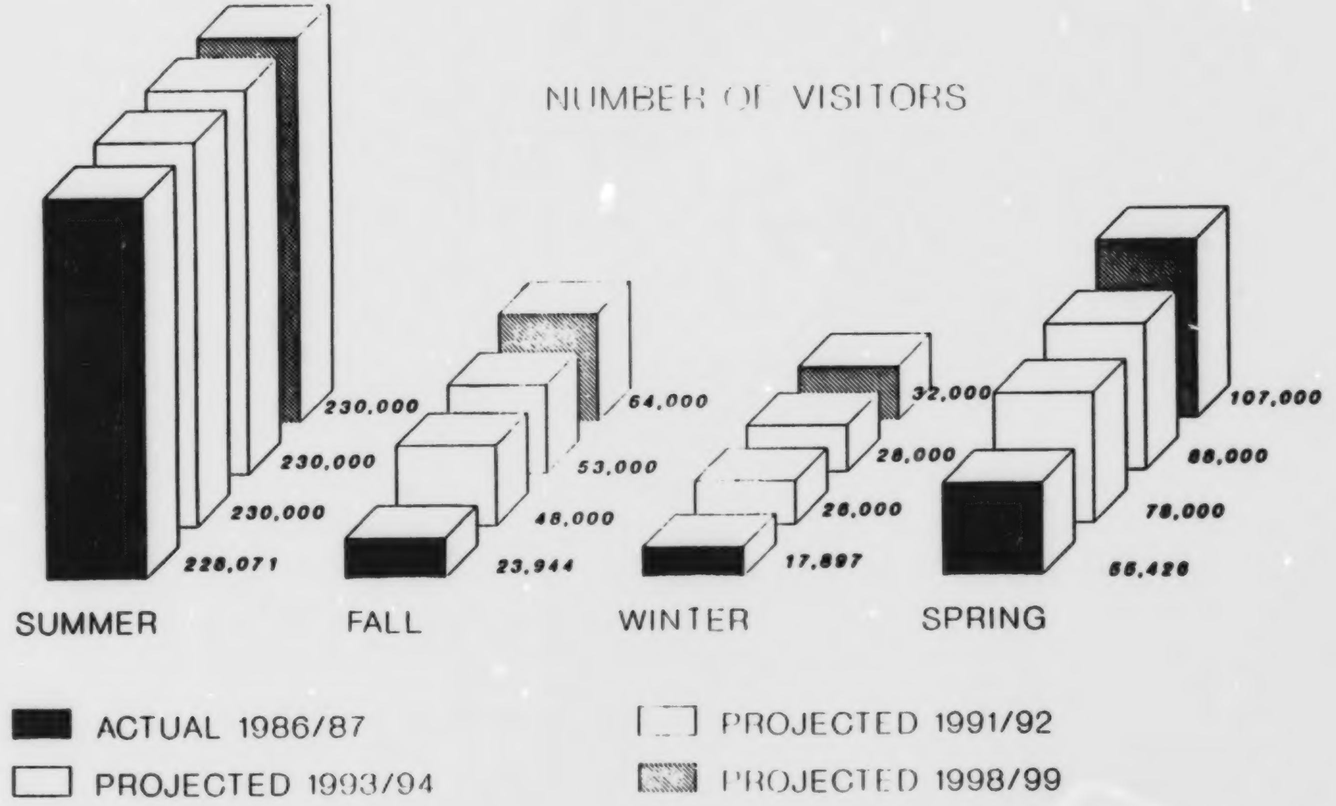


FIGURE 4-1

4.3 Strategic Directions

The marketing objectives reflect the strategic directions identified and confirmed through the public participation process which can be summarized as follows:

- It is of utmost importance to maintain the existing product characteristics of the Park and enhance the townsite by improving accommodation and services.
- Promotions should be aimed at increasing visitation outside the summer months. It is recognized that the Park cannot handle a significant increase in visitation during the summer months especially since the present infrastructure requires considerable improvement and it is not foreseen that sufficient budget dollars will be allocated by the Federal Government to do so. However, many of the commercial establishments in the Park will benefit greatly by increasing visitation outside of the summer months and it would also appear that the Park resources can sustain a considerable growth in visitation during the spring and fall without damaging the integrity of the Park environment.

In order to implement these basic directions, there are also some assumptions made in the strategy as follows:

- The major stakeholders involved in tourism will work together in tourism promotion and development and will consult regularly with other Park stakeholders. The major stakeholders interested in promoting and development tourism include the Waterton Park Chamber of Commerce and Visitors Association, Waterton Natural History Association (as it concerns programs for visitors and the Waterton Heritage Centre as a tourist attraction), Canadian Parks Service, Alberta Tourism, Tourism Canada and the Chinook Country Tourist Association.
- Waterton Lakes National Park should be compared to other Rocky Mountain National Parks in most promotions and literature. In this way, the unique characteristics and differences can be highlighted in a way which will position the Park as providing unique experiences relative to the other Parks.

- That supply and quality issues regarding product will be addressed before significantly increasing promotion. More accommodation and services must be open during the spring and fall, the quality of facilities must be improved and better maintenance of the infrastructure must be implemented before significantly increasing promotion. If these are not addressed, then several problems will be created that will ultimately detract from the overall quality image of Waterton Lakes National Park. At present we have a very well defined product and a positive image which is congruent with the management plan and certainly is enhanced by the general overall public awareness around the world of Canada's National Parks.
- That a common marketing message and image will be implemented. In order to maximize the effectiveness of our marketing efforts, it is necessary to ensure that there is a common message and theme running through all marketing activities by all stakeholders. There must be coordination amongst all public and private sector individuals, businesses and groups working together as a team to provide the best service to visitors.
- That emphasis will be placed in the short term on expansion of existing markets and in the longer term on creating or capitalizing on other markets. Due largely to the lack of marketing resources and service capacity being reached during the summer, it appears that Waterton Lakes National Park has not capitalized on its existing markets especially in Alberta. Therefore, it is not necessary in the short term (within five years) to expend resources on creating awareness of Waterton Lakes National Park in new markets.

4.4 General Marketing to All Segments

Given the market position of Waterton Lakes National Park, it is most important that the marketing efforts concentrate on maintaining or improving the product. Typically, this situation would be described as a supply push situation whereby if the supply of opportunities, accommodation and services is made available and known to the target markets, then it is expected that visitation and expenditures will increase to the projected levels.

PRODUCT

Develop and improve off season events and activities.

One of the most common complaints of visitors is a lack of things to do in the Park during inclement weather and also during the shoulder seasons. Much of this problem is created by the general lack of information presented to visitors at normal points of contact that allow them to become aware of what is actually going on and where. To address this problem a number of improvements should be made as follows:

- Provide outreach interpretive services that bring interpreters to the people (roving interpreters). An interpreter could be dressed and act in the role of Kootenai Brown wandering through the townsite and campgrounds talking to visitors about the Park's features, its history, current events and programs. There are a number of places within the hotels and other commercial establishments that are suitable for interpretive programs and displays. Since it is not likely that additional resources for Park interpreters will be made available, it might be appropriate for the Waterton Natural History Association to provide quality interpretive services on a volunteer basis or using employees if the necessary funds for such employees can be raised. It might also be possible to cooperatively fund these services between the Waterton Natural History Association, the Canadian Parks Service and the Waterton Park Chamber of Commerce and Visitors Association.
- Sports fields in the townsite should be developed to provide better facilities for casual and organized games and tournaments. This should also include the development of a casual games area such as a volleyball court or horseshoe pit.
- Examine the feasibility of covering the swimming pool and operational alternatives that would allow for an extended season of operation and use during inclement weather. The Canadian Parks Service would prefer to have another organization be responsible for upgrading and maintaining the operation of the pool.
- Interpretive services should be expanded into the shoulder seasons. This could include a private sector initiative to provide specialized interpretive services which complement

the services provided by the Parks staff and the Waterton Natural History Association.

- Front line staff at all commercial operations in the Park should be trained to be information counsellors and ambassadors for Waterton Lakes National Park. This program could be offered in conjunction with the Waterton Park Chamber of Commerce and Visitors Association with resources, information and training instructors supplied by the Canadian Parks Service.
- Events such as photo contests, baseball tournaments, hiking meets, wind surfing competitions, film nights, special guest speakers and social events should be organized in the shoulder seasons for entertainment and education purposes. Emphasis should be put on natural features and history of the area such as the history of native people in the park and surrounding area.
- The needs of special groups that would invest in facilities and services to be available to the general public should be met by the Canadian Parks Service. For example, Upper Waterton Lake is a renowned venue for wind surfers. To accommodate these users and staging of special events, a permanent or temporary portable change and washroom facility is required at a lakeshore location in the townsite.

Upgrade accommodation and services.

Most of the accommodation and services provided in the Park require some upgrading and modernization. If the Park is to compete with other mountain park destinations, it must improve basic amenities and accommodations by providing better quality and amenities congruent with it's marketing image. For example, most accommodation in the Park requires better telephone service and improvement in guest room amenities such as better quality towels and toiletries. Improved insulation and mechanical systems are required to allow for proper physical operation and guest comfort during the shoulder season in most accommodation facilities. The quality of food service needs to be improved by providing a broader range of menu items and prices to meet the needs of special groups such as seniors and responding to the needs of the target markets. Of course, many of these changes will have to be made hand-in-hand with increases in business given the recognition that much of the ability of the businesses to improve the quality of accommodation and food service is tied very much to economic feasibility.

It may not be feasible to upgrade some of the existing accommodation structures. Low-rise infill development or replacement of accommodation should be considered especially if the standard of the accommodation will be improved or if it will cater to the needs of a specific target market. The development of a hostel is an example of infill and targeted accommodation development.

There is a general need for commercial establishments to capitalize on the setting. More establishments, especially restaurants, should provide for a scenic view to the outside. The report on architectural motif and guidelines provide excellent guidelines and ideas for physical renovation that can also be applied to theming and design of operations and promotions.

Improve cooperation and coordination of all organizations to meet needs of visitors.

Ultimately, all the government, not-for-profit and commercial organizations in the Park are interested in providing the best possible level of service to visitors. At the present time, there is little opportunity for this effort to be coordinated and there is a lack of recognition and understanding amongst the groups of the roles that each one plays. It would be appropriate to establish a "Visitor Service Coordination Committee" made up of representatives from all the delivery groups including the Canadian Parks Service, Waterton Chamber of Commerce and Visitors Association, Waterton Natural History Association, RCMP and other groups. The objective of this group would be to meet at least once a month to discuss, determine and review actions taken to coordinate and improve services to visitors. Monitoring mechanisms for feedback from visitors on services provided would also be implemented and reviewed. The meetings would also be a forum for each member and their respective organizations to address problems, identify possible solutions and inform each other of future programs. It is hoped that this group will develop a better respect and understanding of each others roles in providing and facilitating the visitor with highly satisfactory and fulfilling experiences.

Develop solution to staff housing shortage.
Commercial operators in the Park have extreme difficulty in recruiting and retaining quality personnel due, in part, to the lack of sufficient and appropriate staff housing. To improve the quality and level of service in the Park, it will be necessary to attract and retain quality people. One solution may be the construction of a multi-unit staff housing building funded jointly by the hotel owners and encouraged by the Canadian Parks Service. The Canadian Parks Service should organize a working group of commercial leaseholders to develop solutions to the staff housing shortage.

Promote infill development.
Infill development at a scale and design compatible with the existing character and image of the townsite should be allowed to occur primarily along Mount View Road and Waterton Avenue. The type of development should include commercial accommodation, retail space, multi-unit residential designed primarily for staff and hostel type accommodation. Accommodation needs for visitors could also be met, in part, by allowing rental of cottages, particularly aimed at the Southern Alberta and Calgary markets. A rental property management firm could be established to properly maintain, monitor and operate the cottage rentals. At present, rental of cottages is in contravention of Canadian Parks Service policies. In view of the fact that this is a way of accommodating visitors without further development of facilities in the Park, these policies should reviewed and possibly changed.

Develop new Heritage Centre.
The Waterton Natural History Association has been operating the Heritage Centre on Waterton Avenue for the past few years. It has prepared a proposal to develop a new and expanded centre. Providing the funds for development can be raised and a successful formula for funding the daily operation and maintenance of the facility can be developed, the Centre should be developed as the main visitor services centre in the townsite.

Develop Circle Tour Products.
Working in conjunction with the Chinook Country Tourist Association and other tourist zones and organizations in Alberta and Montana, the Waterton Chamber of Commerce and Visitors Association should cooperate, assist in development and promote circle tours which capitalize on the major attractions in the region. These major attractions include Glacier National Park, Remington Carriage Collection, Head-Smashed-In Buffalo Jump, Frank Slide Interpretive Centre, major attractions in Lethbridge and numerous community level attractions throughout the area. The Chinook Country Tourist Association has already prepared circle tour products including the Waterton International Heritage Tour.

PRICE

High prices were mentioned by a small portion of respondents to the Exit Survey as being one source of dissatisfaction. However, it is probably more a question of "value for money" rather than high prices that was a source of the complaint. Generally, by comparison with other similar situations, the prices for accommodation, services and goods in Waterton Lakes National Park are quite reasonable. In fact, the hotel and motel accommodations are discounted during the shoulder seasons and packages including meals and attraction admissions are offered which offer excellent value for money.

Maintain Existing Pricing Strategy.
The existing pricing strategy which reduces prices for accommodation in the shoulder and winter seasons should be maintained in the short run (two years). In the long run, prices for shoulder season accommodation and services should increase since the value being sold and provided to the visitor is the "peace and quiet" thus providing value for money. Fees are not being charged for basic interpretive services provided to the general public on a daily basis by the Canadian Parks Service. Supplemental or advanced interpretive programs offered by the private sector or other organizations may have user fees. Existing educational lectures and programs offered by the Natural History Association have user fees. For specialized or personalized interpretive services for individuals or groups, fees should be charged to offset direct and

indirect costs and contribute to projects of the Natural History Association. Proposals to operate private interpretive service businesses should be accepted by the Canadian Parks Service provided a high standard of service and quality can be provided. At present, such services are offered by the private sector in other National Parks.

The Revenue Task Force of the Canadian Parks Service is presently reviewing all fees and charges. It is expected the reciprocal gate pass arrangement between Glacier National Park (U.S.) and Waterton Lakes National Park will be approved in 1989. This will enable purchasers of a pass to one Park to use it for entry to the other Park.

Certainly, the main price difference due to the favourable rate of exchange on the American dollar should be a benefit highlighted in promotions targeted at Americans.

PLACE

Improve directional signage to Waterton in the United States.
Rubber-tire traffic travelling north on U.S. Route 89 north to Canada are directed by signage at the intersection of Routes 89 and 17 to take Highway 17. However, signage at the same intersection indicates that the Chief Mountain Crossing is closed from mid-September to May. For most people, this would indicate that it is also not possible to get to Waterton Lakes National Park. A simple change in signage at the intersection of Routes and 17 and 89 when the Chief Mountain border crossing closes, would re-direct travellers to take Highways 2 and 5 in Alberta via Cardston to get to the Park. This alternate route requires approximately 20 minutes of additional driving time. It should be noted that the closure of the border crossing was not identified as a major problem in the consumer surveys conducted for the Waterton Tourism Study.

Organize lobby to keep Chief Mountain border crossing open longer.
Although the year-round operation of the Carway border crossing allows year-round access from the U.S. to Waterton albeit a longer drive time, the extended operation of the Chief Mountain crossing from mid-April to the end of October will be necessary within two or three years. This will help facilitate access to the Park during the shoulder seasons in

combination with the increasing number of visitors attracted to Glacier Park and the Flathead Valley.

PROMOTION

Hire a full time promotions coordinator.

A full time promotions coordinator is required to properly execute the promotional activities of the Waterton Park Chamber of Commerce and Visitors Association, work with all interest groups and stakeholders, coordinate promotions including local events, and conduct many of the promotional activities. It would be appropriate to hire a full time promotions coordinator for at least six months of the year and on a part time basis, possibly 15 to 25 hours per week for the balance of the year.

Develop annual calendar of events and promotions.

To coordinate the advertising and other promotion activities of all businesses and organizations in Waterton, it would be appropriate to develop a calendar of events and activities at least three or four months in advance of the coming calendar year. Although some of the dates may be tentative, this will allow for proper planning and coordination of marketing activities.

Expand Waterton-Glacier guide.

The Waterton-Glacier guide should be expanded to include all community based activities and events not only in the current period that the issue is applicable to but also for the forthcoming period. Although the guide is handed to each vehicle that stops while the gate is staffed, additional distribution should be through the hoteliers to all hotel rooms and key commercial outlets along with other general information and on daily and weekly activities and programs, especially for season pass holders, long stay visitors and when the Park gate is not staffed. The guide is presently paid for by the Waterton and Glacier Natural History Associations, produced by the United States and Canadian Parks Service and provided free to visitors. Much of the cost of producing the guide is offset by merchants paying for listings in the guide. Perhaps the guide can be expanded to avoid duplication in visitor publications by the Natural History Association and the Chambers of Commerce in Glacier and Waterton Lakes National Parks.

Implement consistent image in advertising and promotion.
Presently, the consumer is receiving mixed messages about Waterton Lakes National Park that are not necessarily congruent with the overall Park image. Advertising and promotion materials produced by organizations lack coordination in colour, type style and titles. The common name on all promotional materials should be **Waterton Lakes National Park**. Of course, each promotional or print piece should be customized according to the service provided or to appeal to specific target audiences. Examples of specific themes for promotional and print pieces include Waterton-Glacier International Peace Park, specific tourist attractions, special events, accommodation packages and promotions.

Implement Waterton toll-free hotline.
Due to the short time frame for the spring and fall target markets to decide on visiting the Park, it is important that an up-to-the-minute information source be readily available to them. Implementation of a toll free line is recommended, at first available only in Alberta, to provide information on the general availability of accommodation and services, information on events and activities, etc. The line could be answered by staff in the visitor information centre and when there is no staff person available to answer the information line, a recorded message would be provided asking the person to leave their name and address so that information pieces can be mailed out to them, if requested. During the period when the information bureau is not staffed, the hotline can be handled by Waterton Chamber of Commerce and Visitors Association in conjunction with the Canadian Parks Service through its administration office in the townsite. In the long run, this hotline could be used to make actual bookings of various packages and register for events and activities in the Park. The main drawback to success that needs to be overcome is cooperation between all groups and individuals in the Park in meeting the needs of visitors rather than presenting the services of only one group.

Keep all stakeholders involved and informed.
One of the most important aspects of marketing is to sell and ensure that the quality of product being offered to the market is indeed the service and quality of product being promoted and delivered by the organization. Therefore, it is extremely important to keep all stakeholders involved and informed in the marketing process. Forums should be set up on a regular basis to ensure that all representatives of the stakeholder groups have input into the marketing programs rather than it being developed by a select group of people with limited input from other interested parties. These forums should be coordinated by the Waterton Chamber of Commerce and Visitors Association.

Work with complementary corporate sponsors.
Due to the picturesque and readily identifiable image of Waterton Lakes National Park, there are a variety of opportunities to work with corporate sponsors who can promote their products at the same time that they promote visitation to the Park. Care should be taken to ensure that the proper Park image is being promoted. Fashion shoots for outdoor sports wear are one example of a complementary corporate sponsorship. It could be arranged for their ads, which include the scene of the Park, to also include the toll free number for additional information about Waterton Lakes National Park. This can be arranged with sporting goods and other fashion retailers in major centres in Southern Alberta.

Another good example of a possible complementary corporate sponsor is working with car rental companies. Presently, Budget Rent-A-Car has discount and package coupons available for its customers. This is an excellent opportunity to promote Waterton especially since it will also increase business for this particular car rental agency. Time Air and Air B.C. also want to increase air traffic and expand routes into Lethbridge. As a major destination for Alberta and American travellers, complementary corporate sponsorship by an airline such as including pictures and articles of Waterton in their in-flight magazine and also featuring pictures of Waterton in ads promoting travel to southern Alberta, may be appropriate.

Participate in committees and promotions of regional groups and attractions.

To maximize promotion of Waterton as a tourist destination, it would be most appropriate to work with other tourist promotion organizations in the area. There have been several tourism marketing and development initiatives over the past few years due in part to the introduction of the Community Tourism Action Plan Program by Alberta Tourism which outlines a process for preparation of a Community Tourism Action Plan and provides limited funding for capital projects. Also, Alberta Tourism has introduced the Team Tourism Program which provides funds for cooperative tourism marketing. The Waterton Chamber of Commerce and Visitors Association has worked with communities, attractions and like-minded organizations and businesses in the region to produce some cooperative marketing programs. There is good potential to expand these cooperative programs. Linkages with other attractions in the area such as Head-Smashed-In, Frank Slide, the Mormon Temple and Fort Macleod are very important to promoting visitation to Waterton Lakes National Park. Waterton has and should continue to participate in cooperative promotions when the same markets are targeted by these attractions, tour operators, businesses and other organizations. Due to budget limitations, participation may be limited to publicity, sharing of promotional information such as mailing lists, and promotional items and giveaways from Waterton merchants.

Work with larger tourist organizations in Canada and the United States.

At least once a year, representatives of the Waterton Chamber of Commerce and Visitors Association, Canadian Parks Service and Waterton Natural History Association should meet with Alberta Tourism, Montana Promotions Division, Alberta Culture and Multiculturalism, Chinook Country Tourist Association and other neighbouring tourist organizations to discuss and coordinate marketing activities for the coming year and to increase awareness of Waterton and what it has to offer. There have already been cooperative marketing campaigns that have worked to the benefit of Waterton and the partner organizations. The campaigns appear to have been conducted at a reasonable cost to the participating partner organizations and with excellent results according to participating parties. For instance, the Waterton Park Chamber of Commerce and Visitors Association have worked with Montana businesses at consumer travel shows in the United States during 1987. Individually, the organization and businesses may not have been able to exhibit at these shows or would have had to reduce their level of participation.

Capitalize on the "Trail of the Great Bear" initiative.
People from Waterton have been instrumental in initiating the Trail of the Great Bear concept which involves establishment of a touring corridor from Yellowstone National Park in Montana to Banff National Park in Alberta. The "Great Bear" is a readily recognizable image and common link amongst these parks, tied in to wildlife and outdoor recreational and cultural activities and attractions. There is also a common link along the Rockies which from a scenic touring point of view is highly desirable by travellers. Since the overall majority of destination traffic into Waterton comes from the north or the south, the Trail of the Great Bear would likely be of great benefit to Waterton Lakes National Park. It is also a common linkage between tourist organizations and businesses along the corridor. A promotions organization with representation from Montana and Alberta needs to be formed and activated to follow through on this initiative.

Develop annual publicity program.
Articles and information packages for publicity coverage by target media should be prepared and distributed during the first quarter of the year to maximize the opportunities of receiving coverage during the spring and summer months of each year. This would also allow for opportunities for writers to arrange familiarization tours during the summer months as a basis to write articles later in the year.

Organize familiarization tours for travel influencers and media in target markets.
Based on the target markets for Waterton, familiarization tours for travel influencers and media should be organized at least twice a year, once in the spring and another time in the fall in order to maximize the impact on travel influencers. Examples of travel influencers include, travel information centre counsellors working at centres in Chinook Country Tourist Zone and also at centres immediately outside the zone including those in the United States, automobile association

counsellors and tour product managers with motorcoach tour companies such as Tauk Tours, Gadabout Tours and Air Canada Touram.

Implement training and orientation programs.
Hospitality and general information counselling programs should be developed and delivered co-operatively by the Waterton Park Chamber and the Canadian Parks Service. The programs should be delivered on a regular basis to all staff, managers and owners of commercial and not-for-profit operations in Waterton. The objective here is to ensure that staff are informed of current events and activities, have answers to common questions about attractions and events in the Park, know basic information sources if additional information is required, and improve overall hospitality skills.

Product packaging for target markets.
Product packages should be designed to appeal to the target markets such as the get away and outdoor adventurer. There should be a common message as a thread amongst all the packagers that ties each package back to the overall theme and image for the Park and the particular marketing program.

Capitalize on strong linkages to other communities and attractions in Alberta.
The results of the Exit Survey indicated strong linkages in travel to other communities such as Banff, Calgary, Edmonton, Cardston, Lethbridge, Lake Louise and Jasper. There are also strong linkages to attractions and events throughout the province including Head-Smashed-In Buffalo Jump, West Edmonton Mall, the Mormon Temple, Dinosaur Provincial Park, the Columbia Ice Fields and the Frank Slide Interpretive Centre. Depending on the message in an individual ad or publicity item, there should be a reference or a map to show the major linkages to communities along with attractions and events in southern Alberta relative to Waterton Lakes National Park.

Create mailing lists.
In addition to a mailing list being created by the Waterton Chamber of Commerce from requests for information, commercial operations in the Park (from guest registrations, prize draws, and program registration

at the Waterton Heritage Centre) and the Canadian Parks Services (optional registration for mailings at campgrounds, the visitor centre and for programs) should supplement this mailing list as a basis to keep visitors informed about what is happening in the Park and what services and accommodation are available. This is especially important since there is a high incidence of return visitation to the Park. This would also provide information to regular visitors to serve as informed traveller influencers for their friends and relatives to visit Waterton Lakes National Park.

Targeted advertising only.
Due to the general limitations on the budget and the narrow product definition in Waterton, it would be more effective for the Chamber of Commerce and Visitors Association and the Canadian Parks Service to do most of their advertising through cooperative ads with larger tourist organizations for general awareness advertising. Limited financial resources should be aimed at the identified target markets. General preference should be to direct mail and also improving the quality and supply of product in the shoulder seasons in order to achieve the objectives for increased visitation and expenditures while maintaining a high level of satisfaction amongst visitors.

Involve Parks staff in selling the Park to visitors for spring and fall.
The Park's staff are an integral part of marketing the Park to visitors. In most cases, they have the greatest influence and impact on the visitor. During presentations and when opportunities arise in discussions with visitors, Park's staff should recommend programs and activities available during the spring and fall periods for visitors to be encouraged to come back again.

Ensure inclusion in major travel guides.
Michelin's, Fodor's, Mobil, McNally's and similar travel guides should be contacted on a regular basis (semi-annually) with updated information on services and facilities available, operating hours, changes in levels of visitation and successful events that draw additional visitors into the Park.

Limited participation in trade and consumer travel shows.
In most instances, personnel from Waterton should cooperate and participate in trade and consumer travel shows through a larger travel organization such as Montana Promotions Division, Glacier Country Tourist Association and Chinook Country Tourist Association. In some instances, where there are target audiences and major travel influencers present, especially in the local region, a trade show booth should be prepared and used to create awareness and reinforce visitation to the Park. Within the region, there is also an opportunity to work with local shopping centres and managers of public buildings to include a display set up on a temporary basis.

4.5 Regional Touring and Recreation Segment

The main objective in marketing to this group is to create an awareness that the Park's attractions and services are available in the spring and fall and that the best time to come to enjoy the scenic splendor and wildlife in Waterton is during these shoulder periods.

PRODUCT

Develop indoor programs for bad weather days.
Interpretive programs, games, and other activities should be organized in the public spaces and hotel facilities during inclement weather periods. This will stem some of the outward flow of visitors when the weather turns for the worse. One group, windsurfers, capitalizes on the windy conditions in Waterton. There are several other items and activities mentioned in the general marketing strategy which pertain to the product enhancement for the regional touring and recreation segment.

Maintain a packaging concept connected to overall theme and image.
Some of the accommodation operators have designed and implemented packages for a variety of events and activities in the Park ranging from golfing to murder mystery weekends. It is important that each of these packages be somehow connected to the overall theme and image for the Park.

PRICE

Provide price incentives for shoulder season visitation.
The regional market is most price sensitive and expect the highest level of service and product even more than foreign and overseas visitors. Due to their high incidence of visitation, it would be appropriate to offer discount coupons and other package information to them during their visits simply by handing out a brochure on shoulder season packages at campgrounds, hotels and motels. This information should clearly illustrate the price break for visits during low visitation months.

PLACE

Improve Park infrastructure.
Second only to visitor services, the basic infrastructure in the Park such as roads, washrooms and sidewalks needs to sustain existing peak loads of attendance and to handle additional loads during the spring and fall periods. Improvements to the main road from the entrance to the townsite and a new entrance area and booth are high priorities for improvement. Recently, the Canadian Parks Service completed a major streetscape, parking and pavement program along Waterton Avenue resulting in an attractive facelift to the townsite's main commercial and most popular area.

Create open appearance of services and facilities in townsite.
The Parks Service and Chamber of Commerce should seek the cooperation of those merchants that are not planning to stay open during the shoulder seasons to maintain an image of being open by not putting their shutters up when they close for the season. Shutters should not be put on buildings until late October and taken down as early as possible in the spring, by mid to late April. There could also be a shutter painting contest organized with guidelines for colours and themes that would complement the image of the townsite and the Park. The Canadian Parks Service should require all shutters, including its own, to be painted according to these guidelines.

Signage at gate kiosk.
Improvements are required at the Park gate to allow regular Park visitors passage into the Park without stopping at the gate provided they have an annual permit. Welcome signage should also be posted at the gate along with a "please drive through" sign during times when the kiosk is closed.

PROMOTION

Focus on single event or activity.
Since most of the regional market is day use or one night stay, it is important to highlight a single event or activity in promotions to this target market.

Implement frequent visitor discounts.
A frequent visitors discount program should be implemented by merchants which would encourage visitation during the shoulder seasons. This program can be implemented by individual operators or by a group effort similar to frequent flyer programs offered by airlines.

Develop cooperative ads with tags by businesses.
Flat sheet flyers and brochures distributed to existing and prospective visitors should include information on how visitors can buy accommodation and service packages in the Park. The recent flyer used for the Alberta/Montana cooperative program with business ads on the reverse side of the flat sheet is an excellent example of this type of cooperative advertising.

Design specific publicity programs for regional touring and recreation segment.
Contact should be initiated with regional media on a more regular basis than media in other markets, possibly twice a month and before and after each major event or activity in Waterton to inform them of successes and planned activities for the forthcoming period.

4.6 Relaxation and Adventure Getaway Segment

This segment can be classified as the "home run" market for Waterton in that it is likely to be the one segment that will contribute the most significant growth in visitation and expenditures. This market segment is principally throughout the northwest United States, Calgary and Edmonton. It also consists of non-consumptive users ranging from bird watchers to windsurfers. The main thing to capitalize on here is the fact that Waterton is relatively uncrowded and quieter than most other national parks accessible by this population.

PRODUCT

Package two and three night getaways.
Wanting to get away from it all, this market segment is looking for all inclusive packages of accommodation, meals, and some options for services. Emphasis should be placed on the quiet relaxing environment of Waterton Lakes National Park.

PRICE

Capitalize on willingness to pay for quality of experience.
Providing that the quality of the product is comparable or superior to competitive products in western Canada and the northwest United States, this market segment is willing to pay the going rate for the experience.

PROMOTION

Advertise in special interest magazines.
Advertising programs should be designed and researched to target magazines which cater to the profile of this market segment. Magazines such as the Edmonton and Calgary magazines, Smithsonian, Travel and Leisure and specialized target print media in the geographic areas orientated towards the outdoor enthusiast, with an above average income and education would be appropriate in selling to the relaxation and adventure getaway segment.

4.7 General Touring Segment

In the short term, the main potential for growth in this market is from auto travellers throughout the United States and across Canada. In the long term, an overseas market could be attracted to Waterton as an alternative to Banff and Jasper National Parks.

PRODUCT

Differentiate from Glacier National Park for Americans.
Although it an important fact that Waterton and Glacier National Parks are combined into an International Peace Park, it is important to differentiate the Waterton product from the Glacier product, especially for Americans. The differences of Waterton being a townsite within a National Park, its proximity and accessibility to the mountains, the abundance of wildlife to view in the townsite and throughout the Park and the concentration of a great number of activities and attractions to be seen over a number of days in the Park and surrounding areas need to be highlighted in promotions.

PRICE

Obtain a premium price for peak season travel.
The general touring market, especially since it often involves younger children, must be willing to pay a premium to stay in Waterton Lakes National Park during the peak summer months of July and August. Particular emphasis and need should be placed on visitor services, activities and facilities oriented towards serving the needs of younger children and their parents and many older retired and semi-retired visitors.

PLACE

Support creation of the "Trail of the Great Bear".
The Trail of the Great Bear concept presents an excellent opportunity to draw this particular segment into Waterton Lakes National Park. As one of the major service centres along the proposed route located within a National Park, it is certain to have more than its fair share

of market increase in visitation as a result of the Trail of the Great Bear's implementation. However, it may be a challenge to draw these additional visitors to the Park during the shoulder seasons.

4.8 Outdoors Segment

This segment is a very specialized segment for the more adventurous outdoor enthusiasts that want to discover and explore an uncrowded, highly accessible National Park.

PRODUCT

Provide basic level of service and information.
This segment requires basic information about unique aspects and features of the Park and the opportunities presented for hiking, wildlife viewing, photography, climbing and other outdoor adventure orientated activities. Specialized groups, such as mountain bike enthusiasts and windsurfers, require designated spaces or special facilities. Parks should work with representative organizations to meet the special needs of these groups through the designation of special areas for them, modifying existing facilities to fulfill their needs, or assistance in organizing and operating events.

PROMOTION

Obtain mailing list for direct mail.
A number of outdoor and naturalist clubs have mailing lists or are willing to include information about unique destinations and experiences available to the membership in their regular mailings. Mailing lists should be secured by the Waterton Park Chamber of Commerce and Visitors Association.

Capitalize on local contacts.
Representatives of various organizations ranging from the Wilderness Association through to the bird watchers and wilderness and wildlife educators and researchers should be contacted in order to help them organize events and outings in Waterton Lakes National Park. The Waterton Park Chamber of Commerce and Visitors Association should

provide packaging support to these individuals in order to offer packages to other members of their provincial, regional, national and sometimes international organizations.

Promote educational programs.
The Waterton Biosphere Reserve designation and the educational mandate of the Waterton Natural History Association provides excellent opportunities to promote the Park for educational programs through a wide range of educational institutions ranging from schools to advance degree programs at the Universities around the world. Local educators and researchers should be contacted to document the opportunities available in Waterton Lakes National Park and the Association should continue and expand direct mailings of information packages to key contacts in order to promote educational programs related to the outdoor segment of the market.

4.9 Conferences, Seminars and Meetings Segment

Providing the quality of accommodation and service improves, Waterton can become a more significant destination for conferences, seminars and meetings in the less than 100 attendees category.

PRODUCT

Produce community based brochure for conference, seminar and meeting facilities.
The complete inventory of conference, seminars and meeting facilities should be documented in a brochure to be used as part of a package for promoting this segment. Some accommodation properties such as the Prince of Wales Hotel and the Kilmorey Lodge may wish to undergo some renovations to properly accommodate this segment by adding larger meeting and banquet facilities.

Provide more guiding/interpretive services.
Packages of guiding and interpretive services during conferences and seminars should be offered to these groups in order to differentiate the Waterton product from other mountain resort destinations.

Provide more speakers for conferences.
Again, to differentiate the Waterton product from other Rocky Mountain destinations, speakers about Waterton's natural and human history should be provided for luncheons and other sessions during conventions, seminars and meetings.

PRICE

Offer meeting room accommodation and meals packages.
All inclusive meeting room, accommodation and meals package prices should be developed for spring and fall seasons which can be competitive with other mountain resort destinations. When possible, prices should be coordinated amongst different hotel properties all involved in providing service to the same convention, seminar or meeting.

PROMOTION

Use direct mail followed by personal visitation.
Corporations with head offices in Alberta, universities, colleges and professional organizations are prime targets within this market segment. They should be contacted first by mail with a general information package with follow up by telephone or in person when visiting several existing and potential clients in a particular centre. A community folder with information on all community facilities including a highlight sheet for the respective property or business promoting the conference, seminar or meeting should be produced for professional presentation to this segment.

Pursue cooperative programs with other organizations and institutions.
Local organizations such as the Waterton Natural History Association have been successful in offering cooperative programs with other organizations and institutions. Similarly, the Waterton Park Chamber of Commerce and Visitors Association can facilitate groups getting together in the region to offer specialized conferences, seminars and meetings in a retreat setting in Waterton Lakes National Park. Development of conference and meeting packages, organization and hosting of familiarization tours, and personal selling trips to association and corporate offices in Edmonton and Calgary in conjunction with the

Chinook Country Tourist Association are some of the major ways of promoting this particular market segment.

4.10 Motorcoach Tours Segment

Most of this segment is presently tied in with the Prince of Wales Hotel and the Glacier Park Inc. operations based out of Glacier National Park. Most of the tours are longer (7 to 14 days) and do not spend sufficient time in the Park to allow passengers to see many of the attractions or participate in some of the Park activities. On the other hand, shorter tours mainly originate from Alberta, Saskatchewan or British Columbia and treat Waterton as more of a destination and spend considerably longer periods of time visiting the attractions and providing opportunities for passengers to experience more of the Waterton atmosphere.

PRODUCT

Send advance tour planning information to tour operators.
Many of the tour product managers lack basic information in order to properly package Waterton as a tour destination. A basic information package informing tour operators of activities, events, and services available in the Park would assist in expanding itineraries for tours and increasing their spending level.

Offer bigger discounts for spring and fall tours.
Most hotel operators in Waterton offer rooms at 10% off the published room rates for tour companies during the summer season. However, to encourage visitation by tours in the shoulder seasons, further discounts during that time period should be considered.

PROMOTIONS

Promote tour operators products and provide referrals.
When receiving inquiries from the more distant markets, prospective tour passengers should be sent information about tour packages available directly from the tour operator or through travel agents.

Conduct sales blitz to tour companies.
A basic package should be prepared by the Waterton Park Chamber of Commerce and Visitors Association to be used as a general mailer to tour companies with follow up information on the results of the motorcoach survey from 1987 and as a basis for telephone or personal follow up to enquire about the operator's plans to include Waterton Lakes National Park as a destination on a tour.

4.11 Expected Results

The expected results of implementing the above noted recommendation are discussed in Section 4.2. Overall, the success of the marketing strategy will be determined by increases in visitation, expenditures and the overall satisfaction of visitors with their visit to Waterton. As mentioned previously, the objective is to maintain or increase the very good or excellent rating of 81% by the Park's visitors using 1986/87 as the base. Of course, another integral component of success is maintaining the integrity of the Park's environment according to Park's policy and the Waterton Lakes National Park Management Plan.

5.0 IMPLEMENTATION

The implementation of the marketing strategy will be largely the responsibility of the major groups and organizations in Waterton Lakes National Park including but not limited to the Canadian Parks Service, Waterton Chamber of Commerce and Visitors Association, Waterton Recreation Board and the Waterton Natural History Association. Many of the promotions will need to be coordinated with promotional activities planned and implemented by other organizations outside of the Park such as Glacier National Park, Chinook Country Tourist Association, Alberta Tourism and various attractions throughout southwest Alberta.

5.1 Waterton Chamber of Commerce and Visitors Association - Marketing Coordination

The Waterton Chamber of Commerce and Visitors Association (WCCVA) should be the main coordinating body for marketing activities in the Park. It is extremely important that the WCCVA maintain close contact and cooperation with all major groups and organizations with marketing interests within and outside of the Park. Ultimately, the Canadian Parks Service should provide support and general marketing guidelines relative to its overall mandate for the Park.

5.2 Implementation Program

Table 5-1 summarizes the implementation by primary organization(s) responsible, timing, implementation rating and budgets for all actions recommended in the marketing strategy. The designation of an organization as primarily responsible does not exclude the involvement and possible financial commitment of other organizations. Ideally, one organization should have the primary responsibility for implementation and be held accountable for each recommendation. The implementation rating is based on access to existing and new volunteer and financial resources. The operations and capital budgets are order of magnitude cost estimates expressed in 1988 dollars. The budgets are for the respective organizations to implement the recommendations. Investments by individuals or businesses are not shown and volunteer commitments are not assigned a monetary value.

Implementation of all recommendations would result in an increase of $290,000 to $400,000 in operational expenditures per annum. Almost half of this amount can be attributed to the improvement of off-season events and activities and the development of a new Heritage Centre. To implement all recommendations involving the Waterton Chamber of Commerce and Visitors Association, the Association would require $75,000 to $100,000 per annum. However, it is likely that an expenditure of $40,000 to $50,000 will be more realistic unless a major outside funding source is identified. Priority should be given to those actions with implementation ratings of one or two.

The main funding source for WCCVA marketing activities are the commercial leaseholders (approximately $30,000 to $40,000 per year). Other sources are Team Tourism, Canada/Alberta Tourism Agreement (CATA), Federal and Provincial employment programs, sale of some items to members and visitors, and cooperative marketing dollars with government agencies and the private sector partners in tourism.

The total capital requirement ranges from $5.5 to $5.8 million. Over half of this amount is needed for infrastructure improvements. Only $2.0 to $2.3 million is required for tourist facilities. It is expected that the infrastructure improvements will be funded by the Federal Government and the development of tourist facilities will be funded by the private sector, fund raising by not-for-profit organizations, conditional grants and debt financing.

TABLE 5-1
IMPLEMENTATION PROGRAM SUMMARY

WATERTON TOURISM MARKETING STRATEGY

MARKET SEGMENT/RECOMMENDATION	WHOM? PRIMARY RESPONSIBILITY	WHEN?	IMPLEMENTATION RATING	BUDGET OPERATIONS (000's)	BUDGET CAPITAL (000's)
GENERAL MARKETING TO ALL SEGMENTS					
Product					
• Develop and improve off season events and activities.	All	1988-99	3	$75-100	$700-1,000
• Upgrade accommodation and services.	WCCVA/CPS	1988-94	2	-	-
• Improve cooperation and coordination of all organizations to meet the needs of visitors.	All	Continuous	1	-	-
• Develop solution to staff housing shortage.	Business/CPS	1988-99	3	-	-
• Promote infill development.	CPS	1988-99	3	-	-
• Develop new Heritage Centre.	WNHA	1988-94	3	$100-125	$1,300
• Develop Circle Tour Products.	WCCVA/CCTA	1988-94	1	$5-10	-
Price					
• Maintain existing pricing strategy.	Businesses/CPS/WNHA	1988-91	1	-	-
Place					
• Improve directional signage to Waterton in the United States.	WCCVA/CCTA/CPS	1988-89	1	-	-
• Organize lobby to keep Chief Mountain border crossing open longer.	WCCVA/CCTA/AG	1990-94	3	-	-
Promotion					
• Hire a full time promotions coordinator.	WCCVA	1988-89	2	$25-30	-
• Develop annual calendar of events and promotions.	WCCVA/CPS/WNHA	1988-89	1	$10-15	-
• Expand Waterton-Glacier guide.	WNHA/WCCVA	1989	2	-	-
• Implement consistent image in advertising and promotion.	WCCVA	1988-89	1	-	-
• Implement Waterton toll-free hotline.	WCCVA/WNHA/CPS	1989	2	$8-10	-
• Keep all stakeholders involved and informed.	WCCVA	1988-89	1	$1-2	-
• Work with complementary corporate sponsors.	WCCVA/CPS	1988-99	1	$5-7	-
• Participate in committees and promotions of regional groups and attractions.	WCCVA/WNHA/CPS	Continuous	1	$10-15	-
• Work with larger tourist organizations in Canada and the United States.	WCCVA	Continuous	1	$5-10	-

LEGEND: **Whom?**
WCCVA = Waterton Chamber of Commerce and Visitors Association
CPS = Canadian Parks Service
WNHA = Waterton Natural History Association
AG = Alberta Government
WRB = Waterton Recreation Board
CCTA = Chinook Country Tourist Association

Implementation Rating
1 = Possible using existing volunteer or financial resources.
2 = Possible providing there is an increase in volunteer or financial resources.
3 = Requires a change in government policy or major funding.

Budget
The budget figures are estimates for financial resources that may be required to implement the recommendations by the respective organizations. Investments by individuals or businesses are not shown. Volunteer commitments are not assigned a monetary value. All budget figures are expressed in 1988 dollars.

TABLE 5-1 (Continued)
IMPLEMENTATION PROGRAM SUMMARY

WATERTON TOURISM MARKETING STRATEGY

MARKET SEGMENT/RECOMMENDATION	WHOM? PRIMARY RESPONSIBILITY	WHEN?	IMPLEMENTATION RATING	BUDGET	
				OPERATIONS (000's)	CAPITAL (000's)
GENERAL MARKETING TO ALL SEGMENTS (Cont'd)					
Promotion (Cont'd)					
• Capitalize on the "Trail of the Great Bear" initiative.	WCCVA/CPS	1989-92	2	$1-2	-
• Develop annual publicity program.	WCCVA/CPS	1989-89	1	$1-2	-
• Organize familiarization tours for travel influencers and media in target markets.	WCCVA	Continuous	1	$2-4	-
• Implement training and orientation programs.	WCCVA/CPS	1988-92	2	$1-2	-
• Product packaging for target markets.	Business/CPS/WNHA/WCCVA	Continuous	1	$1-2	-
• Capitalize on strong linkages to other communities and attractions in Alberta.	All	Continuous	1	-	-
• Create mailing lists.	WCCVA/WNHA/CPS	1988-90	1	-	-
• Targeted advertising only.	WCCVA/WNHA	Continuous	1	$10-15	-
• Involve Park staff in selling the Park to visitors for spring and fall.	WCCVA/CPS	Continuous	1	-	-
• Ensure inclusion in major travel guides.	WCCVA/CPS	Continuous	1	-	-
• Limited participation in trade and consumer trade shows.	WCCVA/CCTA/AG	Continuous	2	$2-3	-
REGIONAL TOURING AND RECREATION SEGMENT					
Product					
• Develop indoor program for bad weather days.	WRB/CPS/WNHA/WCCVA	1988-1992	3	-	-
• Maintain a packaging concept connected to overall theme and image.	All	Continuous	1	-	-
Price					
• Provide price incentives for shoulder season visitation.	Businesses/WNHA/CPS	1988-1992	1	-	-
Place					
• Improve Park infrastructure.	CPS	1988-94	3	-	$3,500
• Create open appearance of services and facilities in townsite.	WCCVA/CPS	1988-89	1	$2-3	-
• Signage at gate kiosk.			1	-	-
Promotion					
• Focus on single event or activity.	WNHA/WCCVA/CPS	1988-89	2	-	-
• Implement frequent visitor discounts.	WCCVA	1988-91	1	-	-
• Develop cooperative ads with tags by businesses.	WCCVA	Continuous	1	-	-
• Design specific publicity program for regional touring and recreation segment.	WCCVA	Continuous			

TABLE 5-1 (Continued)
IMPLEMENTATION PROGRAM SUMMARY

WATERTON TOURISM MARKETING STRATEGY

MARKET SEGMENT/RECOMMENDATION	WHOM? PRIMARY RESPONSIBILITY	WHEN?	IMPLEMENTATION RATING	BUDGET OPERATIONS (000's)	BUDGET CAPITAL (000's)
RELAXATION AND ADVENTURE GETAWAY SEGMENT					
Product					
• Package two and three night getaways.	Businesses/WCCVA	1988-99	1	-	-
Price					
• Capitalize on willingness to pay for quality of experience.	Business/WCCVA	Continuous	1	-	-
Promotion					
• Advertise in special interest magazines.	WCCVA	Continuous	2	$10-15	-
GENERAL TOURING SEGMENT					
Product					
• Differentiate from Glacier National Park for Americans.	WCCVA/CPS	Continuous	1	-	-
Price					
• Obtain a premium price for peak season travel.	Businesses	Continuous	1	-	-
Place					
• Support creation of the "Trail of the Great Bear".	WCCVA/CCTA/CPS	1989-90	2	-	-
OUTDOORS SEGMENT					
Product					
• Provide basic level of service and information.	WNHA/CPS	Continuous	2	$4-6	-
Promotion					
• Obtain mailing list for direct mail.	WNHA/CPS	Continuous	2	$3-4	-
• Capitalize on local contacts.	WNHA/WCCVA	Continuous	1	-	-
• Promote educational programs.	WNHA/Biosphere Reserve Committee	Continuous	1	$3-5	-
CONFERENCES, SEMINARS AND MEETINGS SEGMENT					
Product					
• Produce community based brochure for conference, seminar and meeting facilities.	WCCVA	1990-91	2	$4-5	-
• Provide more guiding/interpretive services.	WCCVA/CPS	1988-89	2	-	-
• Provide more speakers for conferences.	WNHA/CPS	1988-89	1	-	-
Price					
• Offer meeting room accommodation and meals package.	Businesses/WCCVA	1988-89	1	-	-
Promotion					
• Use direct mail followed by personal visitation.	Businesses/WCCVA	Continuous	2	$5-7	-
• Pursue cooperative programs with other organizations and institutions.	WNHA/WCCVA	Continuous	2	$1-2	-

TABLE 5-1 (Continued)
IMPLEMENTATION PROGRAM SUMMARY

WATERTON TOURISM MARKETING STRATEGY

MARKET SEGMENT/RECOMMENDATION	WHOM? PRIMARY RESPONSIBILITY	WHEN?	IMPLEMENTATION RATING	BUDGET	
				OPERATIONS (000's)	CAPITAL (000's)
MOTORCOACH TOURS SEGMENT					
Product					
• Send advance tour planning information to tour operators.	WCCVA/CPS	Continuous	2	$2-3	-
Price					
• Offer bigger discounts for spring and fall tours.	Businesses	Continuous	1	-	-
Promotions					
• Promote tour operators products and provide referrals.	WCCVA	Continuous	1	-	-
• Conduct sales Blitz to tour companies.	WCCVA	1989-91	2	$2-3	-

5.3 Monitoring, Evaluating and Updating the Strategy

An annual monitoring survey similar to the Exit Survey conducted for this study is recommended in order to measure the results of implementing the marketing strategy relative to the marketing objectives.

A minimum of one hundred visitors per season would be interviewed at the Park exit gate. In addition, an electronic traffic count should be maintained by the Canadian Parks Service on a year-round basis for the outbound traffic lane at or near the main Park gate. The results of the Exit Survey should be compiled by the Canadian Parks Service with assistance provided by the WCCVA and Alberta Tourism. Monitoring and evaluating the effectiveness of the Strategy's implementation should be the joint responsibility of the Waterton Chamber of Commerce and Visitors Association and the Canadian Parks Service.

A review and update of the strategy should be done annually during the winter season. It should be coordinated by the WCCVA with input from all internal organizations and cooperating partner organizations outside the Park. The review should be coordinated with the preparation of the annual WCCVA/Park promotion plan and budget.

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APPENDICES:

I. PLANNING AND POLICY FRAMEWORK

II. SUMMARY VISITOR PROFILE

APPENDIX I

PLANNING AND POLICY FRAMEWORK

There are several plans and policies adopted by all three levels of government which ultimately affect the way in which tourism can be developed and marketed in Waterton Lakes National Park. These plans and policies reflect the broad needs and interests of the people resident in the region, Alberta and Canada. It is important to understand the essence and implications of these plans and policies with respect to tourism opportunities in the Park. For this reason, the plans and policies affecting the use and development of the Park and the surrounding area have been reviewed and a synopsis of them is presented herein. The order of presentation is from macro to micro, provincial and national to local, including the Alberta Government's statement on tourism followed by Canadian Parks Service (Parks Canada) policies and Waterton Lakes National Park Plans, then the Glacier National Park Plans, and finally policies, land use plans and bylaws for areas adjacent to the Park in Alberta.

A. Position and Policy Statement on Tourism - Government of Alberta, June, 1985

In the government's White Paper for an Industrial and Science Strategy for Alberta, 1985 to 1990, the following challenge was put forward:

> To fully develop Alberta's tourism potential and to establish a significant tourist industry over the next decade, we must be even more responsive to national and international markets. Given our natural attractions, our major facilities now in place and our reputation for managing world scale events, Alberta's tourism industry should enhance our economic growth over this period. Continued government investment in basic services and major facilities is aimed at developing Alberta's potential as a four season destination point.

At the time, it was estimated that the Alberta tourism sector generated $2 billion in annual revenues and supported approximately 80,000 man-years of employment. It was also noted in the Policy Statement that more than half of the revenue comes from out of province visitors. Alberta's main source of visitors is Canada itself, with the United States, Europe and the Pacific Rim also representing important tourist markets that have excellent growth potential. In essence, the document challenges Albertans to develop a world class tourist destination in keeping with the projection that tourism will be the leading industry in the world by the year 2000.

The Paper outlines a number of new directions that have since been initiated by the Alberta Government including, but not limited to, the following:

- in Alberta tourism campaign;
- Alberta Tourism Hospitality Education Council;
- enhanced tourism promotion in foreign markets; and
- a joint provincial/federal program to provide assistance in facility and product development, alpine ski facility development, market development, training and professional development, industry and community support, and opportunity analysis and evaluation.

In assessing the strengths and opportunities for tourism in Alberta, the Paper recognizes the comprehensive network of Provincial and National parks. One of Alberta's advantages in tourism is having one of the most comprehensive networks of urban, provincial and national parks in the world. In identifying opportunities relative to the Parks, it concluded the following:

- a "good host" image portrayed by all parks staff;
- greater flexibility in land use controls and multi-use of existing land use bases; and
- interpretive education services adjusted to concentrate on meeting market demand and reflecting resource significance.

The Position and Policy Statement identifies Alberta's strength in that it has traditionally been an internationally recognized tourism destination because of its famous Rocky Mountain scenery and resorts. It also recognizes that the mountain National Parks are the focal point of the Alberta tourism industry and are a major attraction for Canada. The report identifies the following opportunities with respect to the National Parks:

- new National Parks' policies complement the needs of tourism and permit modernization and expansion where required;
- reinforce and expand promotion as four-season holiday destinations; and
- utilize the opportunity presented by the great number of visitors to the Rocky Mountain National Parks to draw people into other regions of the province.

B. Parks Canada Policy, 1979

In 1979, the Government of Canada adopted a comprehensive policy with respect to the future directions of the Parks Canada (now known as the Canadian Parks Service) program. Respecting National Parks, the background to the Parks Policy states:

> On the international level, Canada's National Parks are an important component of a world wide endeavour to protect outstanding natural areas. Within Canada, the National Parks are part of a family of parks and wildlife areas administered by different levels of government and designed to serve various public needs. Within the Canada family of parks, the National Parks are distinct because they are natural areas of Canadian significance, because they are protected by federal legislation and because they are financed and dedicated to all Canadians.

In discussing the benefits of National Parks, the Policy states:

> ...there are also benefits which can be measured in terms of jobs created and tourism industry development. Furthermore, National Parks are ecological benchmarks for research into natural processes and into the relative effects of man on lands outside of National Parks. For all these reasons, Canada has a responsibility to

> protect these special places and to encourage public appreciation now and in the future.

The Policy outlines the criteria for identifying representative natural areas of Canadian significance, the selection process for potential National Parks, the establishment of new National Parks and a National Parks zoning system.

With respect to public understanding, appreciation and enjoyment of National Parks, it is stated that Canadians will be encouraged to visit National Parks and "Parks Canada has a responsibility to provide opportunities for the public to enjoy and understand these special places in ways which are compatible with the long term protection of their natural values."

The Canadian Parks Service provides services, facilities and outdoor recreation activities in response to visitor needs.

Concerning visitor use, the Policy states the following:

> Parks Canada will provide for a wide variety of outdoor recreation opportunities which are a means for Park visitors to enjoy and understand the Park's natural environment and which are consistent with the protection of Park resources.

For information and interpretation, the Policy states:

> Accurate information about National Parks will be made available to all Canadians as well as to Park visitors so as to encourage and assist them to appreciate and enjoy National Parks.
>
> Parks Canada will provide opportunities for individuals, private sector and non-governmental organizations to volunteer services in National Parks.

> Parks Canada will develop cooperative arrangements with organizations and individuals to promote public appreciation and enjoyment of National Parks and to encourage their protection.

For visitor accommodation, the Policy states:

> Within National Parks, preference will be given to basic accommodation facilities such as campgrounds, hostels and shelters which enhance visitors' appreciation and enjoyment of the Parks' natural values.
>
> Campgrounds and other forms of basic accommodation in National Parks will be developed in ways which provide visitors with the greatest possible opportunity to experience the natural environment and require a minimum of support facilities and services.
>
> In certain Parks more substantial accommodation facilities may be provided because alternatives are too distant.

C. Canadian Parks Service National Marketing Goals

In December of 1987, the Marketing Branch of the Canadian Parks Service outlined basic marketing goals for National Parks and National Historic Parks and Sites in the context of the overall Canadian Parks Service Policy:

- improved client service;
- development of new markets, both for active visitation and for broader endorsement of the program mandate;
- enhanced public awareness/support to national identity;
- support to tourism growth/economic development; and
- effective use of capital and operating resources.

In outlining strategic directions, the Canadian Parks Service will pursue the following initiatives for implementation by mid 1989:

- marketing research including a national market study for Parks identifying implications for product development and communication strategies;
- a national ad campaign to increase awareness of, and visitation to, the Parks. This will also include new national tourism brochures for National Parks;
- marketing activity demonstration projects implemented in 1988/89;
- program staffing to facilitate marketing integration into Parks Canada; and
- broad marketing orientation and training initiatives proposed for headquarters and regions in 1988/89.

D. Waterton Lakes National Park - Park Management Plan

The Park Management Plan for Waterton Lakes National Park was adopted in May 1978. The Park Management Plan is an expression of Parks Canada's policies and acts as a guide in Park management. It contains a statement of management objectives and means and strategies for achieving them, stated in a broad but comprehensive manner. The Waterton Lakes National Park Management Plan took over two years to complete. It involved an extensive program of public participation and the preparation of a detailed resource inventory. The plan will be reviewed and revised in 1989/90. A visitor activities plan will be prepared in 1989. It will incorporate a draft interpretive plan.

The Plan distinguishes Waterton Lakes National Park from the four larger Parks located in the Rocky Mountains National region due to natural and cultural differences. It notes that the mountains are lower and less rugged and devoid of glaciers. The climate is also milder and most important, a portion of the prairies fall within the Park boundary, abruptly meeting the mountains and giving rise to the Park's theme which is "Where the Mountains Meet the Prairie". With respect to visitation, the plan states:

> Heaviest use of the Park is by the regional population, especially on weekends. Half the visits are day visits. This local interest dates back to Park establishment in 1895. The Park was the fourth in the system (after Banff, Yoho and Glacier), but resulted from local requests quite unrelated to tourist development. In 1932 Waterton Lakes and Glacier National Park in Montana were declared the world's first International Peace Park.

For the Park Management Planning Program, there were six objectives set including:

- To preserve for present and future generations representative and unique natural and archaeological features of southwestern Alberta.
- To allow for the preservation and natural evolution of Park ecosystems.
- To provide opportunities for visitors to learn about the Park though personal contact and Park sponsored interpretive programs.
- To provide recreation opportunities that are compatible with Park's resources and the National Park's Act and Policy.
- To provide facilities which enhance the visitor's enjoyment of the Park.
- In cooperation with Glacier National Park, Montana, to make the World's first International Peace Park truly significant.

The concept proposed in the Plan is that there should be no major changes in land use. The Plan states:

> Most activities and facilities should continue to be concentrated along existing road corridors and in the Visitor Service Centre. Further, given the Park's small size and extensive facility development, there should be no more attempts to build facilities to meet peak demands. It is believed the Park has reached its capacity to absorb visitor numbers and activities and the empha-

> sis now should be on improving the quality of the experience. It is recommended that this be achieved by redevelopment of existing antiquated facilities and by offering increased interpretive opportunities.

An interpretive/orientation centre was identified as a high priority in the Plan. It was also noted that winter enjoyment of the Park should be encouraged, however recognizing that the Chinook climate creates unusual snow conditions and a broad range of weather situations. The Plan also recommended that snowmobiling be eliminated entirely from the Park. With respect to the winter operation of commercial facilities, the Plan recommended this be permitted, provided the business "is viable on the basis of the above recommended activities and does not require attractions unrelated to the objective of enjoying the Park on its own intrinsic merits."

The Plan notes the Park is "a small, fixed area and cannot withstand constantly escalating demands. Only by attempting to balance the supply and demand, even in a somewhat arbitrary manner, can there be any assurance that Waterton Lakes National Park will remain an island of tranquility."

E. Waterton Lakes National Park Visitors Centre Development Plan - 1977

At the same time the Park Management Plan was prepared, a complementary plan entitled Waterton Visitors Centre Development Plan[1] was produced. The main objectives and policy recommendations underlying the Waterton Visitors Centre Development Plan included:

1. To develop the visitor service centre in a manner which would enable visitors to better enjoy and appreciate the Park's natural resources, as they are the major reasons for the establishment of Waterton Lakes National Park.
2. To ensure the quality goods and services necessary for year-round Park use and enjoyment are provided at prices which would allow reasonable opportunity for all income groups to use the Park.

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[1] To clarify the use of the term "visitors center", the term "townsite" may be used.

3. To continue to limit the development of visitor services to the existing area of the Visitor Service Centre so as to minimize this urban intrusion within the Park and surrounding area.
4. To ensure the physical appearance of the Visitor Service Centre emphasizes and complements the natural Park setting and provides the visitor with distinctive experience.
5. To develop and maintain year-round services and facilities within the Visitor Service Centre which will provide comfortable community living for its residents.
6. To ensure that necessary visitor services continue to be provided and the natural recreational attributes of the Visitors Service Centre be protected from increasing visitation pressures.
7. To achieve an on-going process of public involvement which will ensure the plan is kept up-to-date and is responsive to changing visitors needs and aspirations.

The Plan has not been reviewed or revised since its adoption in 1978. However, the Park Management Plan Review process has been recently initiated and it is expected that a new Park Management Plan will be adopted in 1990.

In identifying major concerns to be addressed in the Plan, the following items were identified:

- That future visitation not overwhelm the Visitor Service Centre to the extent that necessary services can not be satisfactorily provided and that visitor enjoyment is drastically curtailed.
- That the commercial development of the Visitor Service Centre not take precedence over visitor recreation, information and Park orientation - an important service role. Furthermore, the urban development of the Visitor Service Centre does not become so intense or artificial so as to lose its natural park-like character nor its options of pursuing related outdoor activities both within the Centre and in adjacent areas.
- That the spectrum of visitor facilities and services provided within the Visitor Service Centre be sufficiently broad, to reflect in good taste and proportion the diverse needs of the visitors who wish to experience the Park. A special concern which

> arises here is that commercial sales and service facilities may be maintained in a viable fashion so that a high standard of service may be provided to the public.

The Waterton Visitor Centre Plan addresses winter operations in some detail. With respect to increasing off-season use of the Park and the need for existing businesses to operate during that time, the Plan states:

> Businesses would be permitted to operate in the fall, winter and spring as their operations would enable greater numbers of visitors to make use of the Park. Such activity would also contribute to the convenience of the year-round resident. However, unless additional off-season attractions (that are compatible with the Park's resources and the National Park's Act and Policy) become popular, local business operations will continue to remain unprofitable during all but the summer months.

With respect to markets, the Plan points out there are approximately 90,000 Canadians and 40,000 Americans resident within a 160 kilometer radius of the Park - the region from which more than half of its visitors originate.

Concerning seasonality, the Plan states:

> The fluctuation in activity within the Waterton Visitor Service Centre from summer to winter is most striking. During its short summer season of approximately 100 days (beginning with the Victoria Day weekend and ending with the Labour Day weekend) well over 400,000 persons can be expected to visit the Visitor Service Centre. This represents over 95% of the yearly Park attendance. At the height of the summer, the Centre is a self-contained community of over 300 residents and as many as 3,000 visitors. During the winter months by contrast, when Park visitation is virtually non-existent, the resident population shrinks to around 115 persons - comprised mostly of Park staff and their dependents.

In discussing the significance and problems underlying the Waterton Visitors Services Centre, the Plan poses an interesting dichotomy in the planning and use of the National Park. It states:

> The current planning attention which is being directed towards the Visitors Service Centre is in large part due to the fact that Park lands are coming under increasing pressure for development and use and because the options for expanding public opportunities appear to be limited. But perhaps more fundamental to the problem, is the fact that many visitors and residents want the Visitors Service Centre to offer all the services, amusements and comforts of home, while at the same time providing them with a distinctive Park experience. This problem is compounded by the fact that Park visitation and use of the Visitors Service Centre is most pronounced on the few major long weekends during the short summer season.

The Plan also analyzes the existing land use within the defined Visitors Service Centre. The Visitors Service Centre comprises approximately 175 acres or .135% of the total land area within the Park. The land use inventory by area is illustrated in Table 1.

Table 1
Visitor Service Centre Land Use Inventory by Area

Land Use	Acres	Percentage
Residential/Cottage	45	25.7
Open Space	38	21.7
Streets and Alleys including public parking	28	16.0
Tent and trailer	16	9.2
Trailer only (fully serviced)	12	6.9
Commercial accommodation	11	6.3
Commercial sales and service	6	3.4
Institutional	6	3.4
Recreational Facilities	6	3.4
Vacant	6	3.4
Storage and Utility	1	0.6
TOTAL	175	100.0

In examining the nature and origin of visitation, the Plan relied on 1971 data. Table 2 summarizes the origin of Park visitors from a 1971 survey.

Table 2
Origin of Park Visitors - 1971

CANADIANS	%	AMERICANS	%
Alberta	65.1	Central U.S.	5.7
Saskatchewan	6.6	Pacific States	3.9
British Columbia	6.5	Mid West	3.6
Ontario	3.4	Eastern Seaboard	1.4
Manitoba	2.2		14.6
Yukon/N.W.T.	0.1	Others	1.5
TOTAL	83.9	OVERALL TOTAL	100.0

In anticipating Park visitation and Plan implications, it was projected that 650,000 visitors would visit the Park in 1985. This increase was projected from a base of 478,000 visiting the Park in 1974. By 1978, visitation eclipsed the projection with a total visitation of 649,000. Since 1978, the highest visitation level was recorded during the 12 month period ended March 31, 1981 at an estimated 671,000 visitors.

The Plan provided a detailed inventory of type and number of commercial operations in the Park. Table 3 is a summary of businesses existing in the Park in 1974.

Table 3

Type and Number of Commercial Operations - 1974

Type of Business	Number
Accommodation Facilities	12
Grocery Stores	3
Restaurants and Take-Out Foods	7
Automotive Services	3
Personal Supplies and Services	5
Apparel and Accessories	3
Commercial Entertainment and Tours	5
Curio Shops	5
Beer and Liquor Sales	4
TOTAL	47

In discussing visitor accommodation, the inventory of units at the time the plan was prepared was 308 units in motels, hotels and lodges and 241 units in public campgrounds and trailer parks.

F. The Waterton Biosphere Reserve

"Biosphere Reserve" is an international designation approved by UNESCO (United Nations Educational, Scientific and Cultural Organization). Biosphere Reserves are representative examples of the world's major landscapes, each with its characteristic plants, animals and landforms, and each maintaining its various patterns of human use and adaptation. The Waterton Biosphere Reserve is one of a few reserves in Canada and several hundred around the world. The Waterton Biosphere Reserve, which includes Waterton Lakes National Park and much of the area surrounding it, was designated in 1979 but it was not until 1982 that an active program began.

The goal of the Reserve is to encourage the integration of use, development and conservation of natural resources through programs of public information and education and through environmental research and monitoring. The Waterton Biosphere Reserve objectives are:

1. To promote the public awareness of resource management concerns facing the residents of the Waterton area.
2. To participate with area residents in developing projects to address local concerns.
3. To encourage cooperative resource management practices between private land owners and government agencies by providing a forum for exchange of information.

The results from the fulfillment of these objectives will be most useful in enhancing visitor opportunities and services in Waterton Lakes National Park.

G. Architectural Motif and Guidelines for Waterton Lakes National Park

An architectural motif and guidelines report was completed in February of 1987 for the Canadian Parks Service. The purpose of the architectural motif is:

- to recognize that Waterton Park's Visitors Centre is unique and to identify and enhance the elements of the built environment that helped make it so;
- to identify the inherent qualities of the Park setting and to protect the natural environment from adverse conditions generated through inappropriate development of the site;
- to provide guidelines for future development, which will encourage an esthetically pleasing architectural environment based on historical precedent, sensitive design and sound planning principles; and
- to provide owners, designers, builders, Park staff, and others involved in the building process with a common basis for evaluation of proposed developments.

The study analyzed the architectural context for phases of Park development and identified the types and styles of building design that have been implemented. The report recommends a certain scale of building be designed which are clearly subordinate to the natural setting. There are certain important qualities that need to be taken into consideration when designing new buildings or improving the facades and finishes of existing buildings including:

- simple symmetrical basic forms;
- little or no decoration;
- direct and uncomplicated use of a few materials;
- small size; most buildings of one or one and a half stories;
- growth by the addition of discreet similarly scaled masses; and
- little or no identification of individual plots by planting or fences.

The overall aim of any design of the Visitors Service Centre is the evolution of a coherent, and appropriately scaled community, which maintains the historical presence of settlement, adequately serves the needs of visitors and residents, and presents a distinctive and enjoyable architectural character.

The report presents a number of design principals and guidelines applicable to all types of development: building, landscape, bridges, signage, etc. and apply to both private sector and public sector projects. The guidelines address the following points:

- site context;
- street pattern;
- scale and character;
- image and identity;
- vehicular movement and parking;
- pedestrian movement;
- climatic impact;
- commercial areas;
- the lakeshore;
- unit development;
- identity; and
- relationship to the exterior.

The document presents excellent guidelines to reinforce the architectural motif, character and image of Waterton. From a marketing point of view, the guidelines applicable to image and identity are quite important. Respecting the townsite, the study states:

- Developments immediately adjacent to significant or historical buildings should respect the existing patterns and details such as:
    - height
    - rhythm of buildings on the street
    - compatibility of materials and colour
    - roof slopes and shapes
    - openings and fenestration
    - building elements such as cornices, railing, lintels, arches, ironwork, chimneys, moldings, etc.
- New development should introduce design features which enhance the "motif" of the overall townsite. Positive unique features will be considered for individual developments provided they are not done solely for the self-interest of the project, and provided they can integrate with neighbouring buildings.
- Existing views into, through, and out of new developments should be maintained and where possible improved.
- The public areas of the Park should continue to assure access to strategic vantage points along the lakeshore, at the marina, around Emerald Bay and from the look out at the Prince of Wales Hotel.
- Development design which would cut off existing views from various tourist vantage points should not be considered as appropriate to the overall planning of the Park.

H. Glacier National Park/Montana Final Master Plan - 1977

The Master Plan for Glacier National Park seeks to provide the direction that will underlie future management programs and suggest how these programs can best serve the preservation and use of the resources and how they can benefit the Park, the surrounding region, and the two nations that have pooled their natural resources. The Park, which is over five times the area of Waterton Lakes National Park, is a spectacular combination of precipitous peaks, glacier-carved valleys, mountain glaciers, mixed forests and picturesque forested valleys. It is one of the great National Parks of the western United States encompassing outstanding examples of mountain formations, usually within the context of a more extensive mountain range. As stated in the Plan:

> ...Glacier is typical of these parks in this regard, it is, however, atypical in three important aspects. Its many lakes afford an exceptional opportunity for waterborne transportation. This can be both a means of access and a significant part of the Park experience. Secondly as an International Peace Park straddling the United States/Canada border, it not only serves as an attraction for many Canadian citizens but offers an excellent opportunity for international cooperation in management and interpretation of our environment. Thirdly, on September 17, 1974, ... Glacier National Park (was designated) to the United Nations Educational, Scientific, Cultural Organization (UNESCO) as a unit of the World Biosphere Reserve. This international recognition gave the Park world stature and significance as a reserve for the preservation of terrestrial environment, international research, and coordination.

The prime consideration in the Plan is "to maintain the serene-wildland character of the Park, while still providing an outstanding experience for both general vacationers and wilderness enthusiasts".

In terms of visitation, there was over 1.4 million visitors during 1974, representing a mean annual growth of over 6% since 1960 (724,538 visitors). To a large part, visitation to the Park is tied to trans-continental travel since it is not adjacent to any major metropolitan area. The Plan estimates that througnout the week approximately 25% of the visitors stay in the Park overnight at various lodges and campgrounds. Day use is described as a wilderness threshold experience with penetration of the wilderness dependent upon the desire and capability of the visitor. Visitor concentrations during the day are most apparent at Many Glacier, which is the hub of wilderness trails; along Going-to-the-Sun road, especially at Logan Pass; and at Lake MacDonald and Two Medicine Lake. The Plan also noted there were a great number of wilderness campers with approximately 28,257 camper days recorded in 1974.

The Plan recognizes in several places that Glacier is the larger portion of the Glacier-Waterton Lakes International Peace Park which constitutes the core of a vast mountain complex that forms the continental divide in this area of the Rocky Mountain range and includes superb natural resources in both Canada and the United States. In the objectives of the Management Statement included within the Master Plan, it is pointed out that management of the Park will be geared to maximum enjoyment of the resources by visitors from May 30 through October 15. In terms of winter use of the Park, the objectives state that use will be encouraged where appropriate in keeping with service policies and objectives during the period December 15 through March 15.

One of the more significant management objectives reads as follows:

> Cooperative activities with Waterton Lakes National Park, Canada, will be promoted to revitalize and make the world's first International Peace Park more meaningful. This will be exemplified by exchange interpretive programs, joint brochure and other publications when feasible, interrelated exhibits and signs, and joint efforts to promote the universal values of parks to citizens of the world.

Also important in the management objectives is the statement concerning the Going-to-the-Sun road. The Plan states this will be kept open for visitor use between mid-June and mid-October of each year.

I. Glacier National Park: Statement for Management - 1985

The U.S. National Parks Service approved the Statement for Management providing an inventory of the conditions and a listing of problems at Glacier

National Park. The Statement identifies resource, visitor use and management issues and describes the Park's present and future responses to these concerns. The document will be used by Park management to determine the nature and extent to which required plans and studies will be implemented.

In analyzing visitor use, the study states that since 1974, use of Glacier National Park has increased at an average annual rate of 4% with 1,947,000 persons visiting the Park in 1984. Table 4 presents a summary of the origin of Park visitors compared with more recent statistics provided by the U.S. National Parks Service.

Table 4
Glacier National Park
Primary Origins of Park Visitors

	1984	1987
Montana	18%	16%
Alberta	13	11
West Coast States	19	19
Mid-Western States	18	20
Mountain States	6	10
Foreign	2	4
Other	24	20
	100%	100%

The primary visitor activities in the Park include sightseeing, hiking, camping, picknicking, fishing and boating. The peak season in the Park occurs during the short summer with 77% of the use in the months of June through August.

There are several issues that were identified in the Statement for Management which include the need to coordinate efforts with Waterton Lakes National Park. This includes efforts to conserve for present and future human use the diversity and integrity of biotic communities within natural ecosystems and to safeguard the genetic diversities of species on which their continuing evolution depends. Glacier National Park will work with Waterton Lakes National Park to prevent the degradation of the Park's natural resource base because of an incompatible management of adjacent lands. There is a wide variety of other management programs that Glacier National Park is undertaking with Waterton Lakes National Park ranging from habitat through to interpretive services.

J. Management Strategy for Glacier National Park, 1987-1992

The Management Strategy was adopted in May of 1987. The five year strategy outlines what Glacier National Park would like to achieve by the year 1992. One of its primary goals is in the field of regional management. It states:

> Promote conservation and suitable use of the Northern Continental Divide Ecosystem by expanding the scope and effectiveness of a Man and a Biosphere program. Add complementary federal lands to the biosphere reserve system now comprised of Glacier National Park, Waterton Lakes National Park, and the Coram Experimental Forest, and seek re-designation of the revised complex as the "Northern Rocky Mountains International Biosphere Reserve". Work with British Columbia and Alberta to manage adjacent areas to Glacier National Park in a manner compatible with protecting Park resources.

Other goals in the Plan address cooperative relations, cultural resource management, natural resource management, science, visitor use/services, and internal efficiency and effectiveness.

K. Eastern Slopes Zoning Policy, 1984

In 1984, the revised policy titled "A Policy for Resource Management of the Eastern Slopes" was adopted by the Minister of Public Lands and Wildlife. The policy presents the Government of Alberta's resource management policy for the public lands and resources along the Eastern Slopes. The Eastern Slopes of Alberta's Rocky Mountains cover an area of approximately 90,000 square kilometers of mainly forest-covered mountains and foothills.

Provincial goals established for the various resource sectors provide the framework for developing more detailed regional resources objectives. The goals only apply to public lands and resources. The goals cover water management, wildlife, fisheries, recreation, timber, rangeland, agriculture, tourism, mineral resources, and cultural and ecological resources.

The tourism goal stated in the policy is:

> **To encourage the provision of a diverse range of private and public sector tourism facilities, attractions, accommodations and services capable of meeting increasing demands for leisure and business-related opportunities.**

Land and resources are classified into three broad areas:

- Protection: To provide the highest level of protection for those areas which are known to form the unique character of the Eastern Slopes.
- Resource Management: To foster wise mixed use of the natural resources to achieve specific goals and objectives.
- Development: To recognize existing and provide for future site-specific development.

The lands adjacent to the Park's boundaries are designated under one of the following resource management zones:

- prime protection;
- general recreation;
- multiple use; and
- agriculture.

The policy further outlines policy guidelines for use of lands and resources along with a discussion of policies and guidelines used to implement the management interests for the Eastern Slope Policy. One such policy is the Integrated Resource Planning System. The Castle River Integrated Resource Plan designates areas which will accommodate a number of opportunities for tourism development.

L. M.D. of Pincher Creek, No. 9 Land Use By-law No. 714 and General Municipal Plan By-law No. 809.

The M.D. (Municipal District) of Pincher Creek's Land Use By-law, adopted in 1980, contains a land use district, namely Special Area No. 3, which affects the land along the northeastern boundary of Waterton Lakes National Park. The intent of Special Area No. 3, as stated in the by-law, is:

> To regulate land in the vicinity of Waterton Lakes National Park, such that pressure for recreational development in close proximity to the Park boundaries is relieved, continued agricultural use in the area is encouraged, and the natural beauty and character of the Park approach is preserved.

Special Area No. 3 achieves this intent by allowing only traditional agricultural uses as permitted uses, limiting the types and range of discretionary uses which may be approved, and by disallowing or expressly prohibiting all other uses, including country residential or cottage subdivisions and highway commercial development such as motels, service stations and drive-in restaurants.

The Municipal District of Pincher Creek's General Municipal Plan was adopted by Council in 1987. Besides reviewing the problems associated with development immediately adjacent to the Park, one of the main features of this document was to reaffirm Council's commitment to retain a special land use district for the lands adjacent to the Park in any future land use by-law. As stated in policy 8.1 of the plan:

> This special land use district shall:
>
> a) protect and conserve the natural scenic attributes of the lands adjoining Waterton Lakes National Park;

b) prohibit all commercial, highway commercial and commercial/private recreation land use or development, excluding bona fide home occupations; and

c) protect and conserve the lands adjoining Waterton Lakes National Park for extensive agricultural use.

The General Municipal Plan also indicated, that while successive councils and area residents in the M.D. of Pincher Creek have long recognized the wisdom of protecting the land immediately adjacent to the Park from residential and commercial development, pressures for such development have nevertheless continued. The plan acknowledged that one way to address these pressures in a constructive manner would be to direct such development to nearby hamlets, including the Hamlet of Twin Butte some 15 km north of the park on Highway 6. The plan indicated, however, that before a decision is made to target Twin Butte for specific types of development, further discussions and a number of studies would be needed.

M. M.D. of Cardston, Number 6, Land Use Bylaw Number 348 - 85 and General Municipal Plan Bylaw Number 364 - 86

All lands immediately east of Waterton Lakes National Park are designated under the Agriculture Land Use District of the Land Use Bylaw. As stated in the Bylaw:

> The intent of the Land Use District is to provide for the protection of better agricultural land from undue fragmentation for non-agricultural uses through the regulation of permitted and discretionary land uses.

The permitted uses are all agriculturally related with discretionary uses ranging from public parks and other public outdoor recreation uses to service stations, veterinary clinics and kennels, auto wreckers and air strips. There is not specific recognition of the existence of Waterton Lakes National Park in the Land Use Bylaw. It should be noted the Land Use Bylaw has been amended to allow commercial development as a discretionary use in the

Agriculture Land Use District. The Oldman River Regional Planning Commission is presently preparing an area structure plan for the vicinity of Highway Number 5 between the Belly River and the Park entrance.

In the Land Use Policy section of the General Municipal Plan, there is a policy concerning regionally significant areas. The Policy was established to ensure the protection of all regionally significant areas in the M.D. of Cardston and provides a provision for the Municipal Planning Commission to approve a use if, in its opinion, the proposed use will not have a detrimental effect on existing or proposed recreation areas, the natural amenities of the area, or a critical wildlife zone and if the application has been referred to the Oldman River Regional Planning Commission for comment. As defined, a regionally significant area means a public park, designated historical or archaeological site, environmentally sensitive area, forest service, or any similar facility owned and/or administered by any level of government.

APPENDIX II

SUMMARY VISITOR PROFILE
WATERTON LAKES NATIONAL PARK
NOVEMBER 1, 1986 TO OCTOBER 31, 1987

	Winter	Spring	Summer	Fall	Annual
A. VOLUME **					
Total estimated vehicles	6,604	20,155	81,164	10,189	118,112
Average vehicle party size	2.71	2.75	2.81	2.35	2.75
Total visits ('000)	17,897	55,426	228,071	23,944	325,338
Average nights in Waterton (All Visits)	0.8	0.5	1.7	1.3	1.4
Total visit-nights	14,318	27,713	387,720	31,127	460,878
B. DURATION					
All Visits					
Average No. of Nights on Trip	2.2	4.1	10.0	8.4	8.4
Average No. of Nights in Alberta	2.0	2.1	3.7	3.3	3.3
Average No. of Nights in Park	0.8	0.5	1.7	1.3	1.4
1 + Night Visits Only					
Average No. of Nights on Trip	8.0	8.5	13.2	12.6	12.5
Average No. of Nights in Alberta	7.2	4.6	5.7	5.1	5.5
Average No. of Nights in Park	10.4	1.7	3.7	3.5	3.5
C. VISITOR ORIGIN					
Southern Alberta	75%	55%	28%	28%	35%
Calgary	8	15	8	6	9
Edmonton Metro	3	1	4	9	4
Central/Northern Alberta	3	2	6	4	5
British Columbia	2	4	3	11	4
Saskatchewan	2	*	4	3	3
Ontario	2	1	2	2	2
Other Canada	1	1	1	6	1
Montana	*	3	7	2	6
Other Northwest States	2	2	6	6	5
California	1	3	5	4	4
Other States	1	10	24	14	19
Europe & Other Countries	*	3	2	5	3
D. VEHICLE TYPE					
Car	69%	63%	62%	59%	62%
Truck/Truck Camper/Van	30	31	33	33	32
Motorhome/R.V.	*	5	4	6	4
Motorcycle/Bicycle	*	1	1	2	1
E. OVERNIGHT ACCOMMODATION IN PARK					
Hotel/Motel	39%	38%	49%	44%	47%
Campground	13	49	44	50	45
Cottage/Home of Friend	48	12	6	6	7
Other	*	1	1	*	1
F. PRIMARY TRIP PURPOSE TO WATERTON					
Vacation	7%	32%	64%	47%	54%
Day Use/Social	78	55	27	39	36
Personal/Family	6	6	6	4	6
Personal Business	3	4	2	2	2
Business	6	2	1	2	1
Attend Meeting	*	*	1	6	1
G. NATURE/COMPOSITION OF TRAVEL PARTY					
Couple	28%	28%	38%	46%	37%
Family/Relatives	38	43	41	23	40
Friends	17	16	11	8	12
Alone	15	13	9	19	10
Other	3	1	1	3	1
H. HOUSEHOLD INCOME					
Less than $20,000	19%	23%	13%	11%	15%
$20,000 to $39,000	39	28	28	40	29
$40,000 to $59,000	22	27	28	30	28
$60,000 +	20	22	31	21	28

APPENDIX II

SUMMARY VISITOR PROFILE
WATERTON LAKES NATIONAL PARK
NOVEMBER 1, 1986 TO OCTOBER 31, 1987
(Continued)

	Winter	Spring	Summer	Fall	Annual
I. EXPENDITURES IN WATERTON/PERSON/VISIT					
Meals and Refreshments	$0.95	$5.06	$9.29	$6.01	$7.88
Groceries & Beverages in Stores	0.14	1.39	2.22	1.39	1.91
Accommodation	0.72	3.41	9.72	4.51	7.77
Gas & Oil	0.11	0.71	1.28	0.42	1.06
Auto Maintenance & Repairs	0.00	0.06	0.19	0.12	0.14
Park Entrance Fees and Licenses	0.00	1.30	1.28	0.95	1.19
Recreation & Entertainment	0.07	0.79	2.59	0.89	2.02
Conference/Convention Registration Fees	0.00	0.05	0.20	0.25	0.17
Retail Store Purchases	0.10	2.24	6.06	2.89	4.85
All Other Goods & Services	0.03	0.09	0.42	0.27	0.32
Total Per Person Per Visit	2.11	15.08	33.24	17.60	27.32
Total Expenditures in Waterton ('000)	37.8	836.0	7,580.7	421.4	8,876.0
J. MAIN TRIP DESTINATION IN ALBERTA					
Waterton	76	72	69	65	70
Banff	*	2	4	11	4
Calgary	1	2	5	1	4
Jasper	*	4	4	2	4
Edmonton	*	1	3	1	2
Lethbridge	4	5	2	3	2
Other S.W. Alberta	18	4	5	10	6
Other Alberta	1	4	4	2	4
None	*	6	4	5	4
K. VISITOR ACTIVITIES (ANNUAL TOP 10) ***					
Sightseeing by Car	85%	81%	87%	91%	86%
Walking	39	68	79	82	75
Wildlife Viewing	56	64	68	72	67
Photography	34	44	58	62	55
Shopping	3	38	63	30	53
Resting/Relaxing	12	39	48	43	44
Restaurant Dining	9	31	50	42	44
Visiting Glacier Park	2	21	50	39	41
Vegetation/Flora Viewing	12	37	43	44	41
Bird Watching	19	25	27	37	27
L. FACILITIES/PROGRAMS USED BY VISITOR (ANNUAL TOP 5) ***					
Hiking Trails	20%	35%	40%	43%	38%
Information Centre	4	14	35	22	29
Scenic Boat Tour	*	4	18	6	14
Interpretive/Education Programs	1	4	16	18	13
No Facilities/Programs	70	51	35	36	40
M. ATTRACTIONS/SITES VISITED IN WATERTON (ANNUAL TOP 5) ***					
Prince of Wales Hotel	13%	40%	61%	47%	53%
Cameron Falls	49	50	47	45	49
Cameron Lake	26	30	41	40	38
Red Rock Canyon	24	32	37	47	37
Marina	10	29	34	28	31
N. TIMING OF DECISION TO VISIT WATERTON					
Same Day	61%	40%	23%	28%	28%
Within Previous Week	32	36	35	45	36
Within Previous Month	4	13	17	14	15
Within Previous 3 Months	2	7	14	8	12
More than Previous 3 Months	1	4	12	6	9

APPENDIX II

SUMMARY VISITOR PROFILE
WATERTON LAKES NATIONAL PARK
NOVEMBER 1, 1986 TO OCTOBER 31, 1987
(Continued)

	Winter	Spring	Summer	Fall	Annual
O. SOURCES OF INFORMATION INFLUENCING VISIT TO WATERTON					
Previous Experience	66%	57%	39%	47%	44%
Friends and Relatives	24	19	23	22	23
Tourist Information Centres	1	6	12	9	10
Map, Atlas	1	2	5	6	4
Glacier Park	*	3	5	1	4
Travel Article	*	3	4	8	4
Travel Guides	2	2	2	3	2
Alberta Travel Literature	1	2	1	*	1
Other Brochure	1	1	1	*	1
Travel Agent	*	1	1	*	1
Advertisement	*	1	*	*	*
Other	2	2	3	4	3
No Information Used	2	1	4	*	3
P. OVERALL SATISFACTION WITH VISIT					
Excellent	20%	34%	38%	45%	37%
Very Good	34	40	46	46	44
Good	34	21	14	7	16
Fair	9	5	2	2	3
Poor	2	*	*	1	*
Q. VISITOR SUGGESTIONS FOR IMPROVEMENT (ANNUAL TOP 10) ***					
More Facilities, Activities	7%	11%	10%	6%	10%
Better Camping Facilities	3	8	8	5	7
More Camping Facilities	7	6	6	3	6
More Places Open	22	4	2	14	4
Better Signage	1	3	3	8	3
Control on Growth	5	2	2	8	3
More Restaurants	1	3	3	1	3
Better Roads	1	1	2	1	2
More Hotel Facilities	*	1	2	*	2
Nothing in Particular	47	55	56	53	55

* = Less than 1/2 of 1% or zero.
** = Excludes motorcoach tour passengers.
*** = Multiple responses allowed.
Note: May not add to 100% due to rounding or multiple responses allowed.

Winter = November 1, 1986 to April 14, 1987
Spring = April 15 to June 14, 1987
Summer = June 15 to September 7, 1987
Fall = September 8 to October 31, 1987